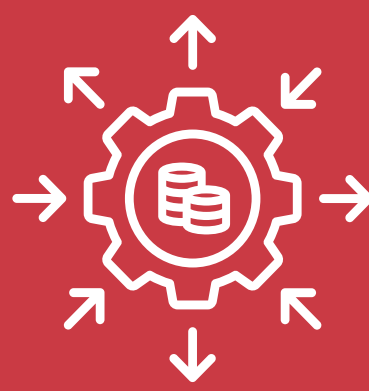


Climate &  
Development  
Ministerial

---



# COUNTRY PLATFORMS **ACTION TOOLKIT**

MOHSEN GUL, ANAA HASSAN, AARON ACUDA AND ROJY JOSHI

# ACKNOWLEDGEMENTS

The C&DM Secretariat thanks all interview participants for sharing their insights and experiences, which were invaluable to this work. They include Edwin Obiero (LIFE-AR Secretariat), Dr Christopher Bartlett and Anne Marie Robert (Vanuatu), Nicolas Steven Escobar Forero, Luis Alejandro Noguera Robayo and Marielena Daniela Bernal Sánchez (Colombia), and Alex Mulisa (Rwanda). We also extend our appreciation to C&DM Secretariat members Sydney Church (IIED), Leo Charlesworth (IIED), Ana Mulio Alvarez (E3G) and Rachael Drake (E3G) for their support, and to the wider C&DM and Brain Trust members, whose guidance and collaboration helped make this work possible. Special thanks to Alice Nightingale for her meticulous copyediting and proofreading, and Mariana Chicaybam for the stunning document design.

# DISCLAIMER

The views expressed in this publication are those of the authors and do not necessarily reflect those of the C&DM Secretariat, partner countries or organisations.

# FUNDING

This work was made possible through the support of the Climate Emergency Collaboration Group, a sponsored project of Rockefeller Philanthropy Advisors.

# HOW TO CITE THE PUBLICATION

Gul, M, Hassan, A, Acuda, A and Joshi, R (2026) Country Platforms Action Toolkit. Climate and Development Ministerial.

# TABLE OF CONTENTS

ABBREVIATIONS	6
<b>INTRODUCTION   CONTEXT AND PURPOSE OF THE TOOLKIT</b>	<b>7</b>
WHAT THIS TOOLKIT IS — AND IS NOT	8
WHO THE TOOLKIT IS FOR	8
HOW THE TOOLKIT IS STRUCTURED	9
HOW TO USE THIS TOOLKIT	10



## **1. START WITH YOUR REALITY** **AVOID DUPLICATION** **11**

WHY CONSIDER A COUNTRY PLATFORM? 12

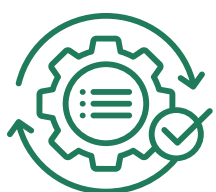
WHERE TO START? 12

STEP 1 | MAP EXISTING PLANS AND STRATEGIES 13

STEP 2 | MAP INSTITUTIONS AND CO-ORDINATION MECHANISMS 13

STEP 3 | MAP FINANCE FLOWS 14

STEP 4 | DUPLICATION CHECK — WHAT WOULD A COUNTRY  
PLATFORM ADD? 15



## **2. DIAGNOSTIC AND READINESS FOR** **COUNTRY PLATFORM DEVELOPMENT** **16**

ENTRY POINTS | TRIGGERS FOR CONSIDERING A CP 17

*ALTERNATIVES* 20

DIAGNOSTIC QUESTIONS | ASSESSING CONTEXT AND READINESS 22

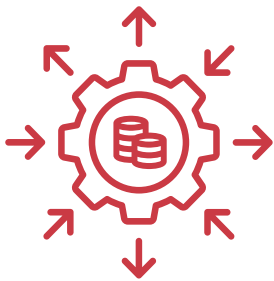
COUNTRY PLATFORM TYPOLOGIES AND THE READINESS SPECTRUM 24

*CASE STUDY: VANUATU — PRIORITISING ADAPTATION AND LOSS  
AND DAMAGE THROUGH A NATIONAL PLATFORM* 26



### **3. GOVERNANCE AND INSTITUTIONAL ARCHITECTURE | DESIGNING THE PLATFORM'S ENGINE ROOM** **27**

PURPOSE AND DESIGN PRINCIPLES	28
POLITICAL ANCHORING, MANDATE AND LEGAL BASIS	28
GOVERNANCE BODIES AND ROLES	29
TWO GOVERNANCE MODELS	30
SECRETARIAT, CO-ORDINATION AND 'PLUMBING'	31



### **4. FINANCE ALIGNMENT AND ARCHITECTURE TRACK, ALIGN, NEGOTIATE, (OPTIONALLY) CHANNEL** **32**

FINANCE FUNCTIONS OF COUNTRY PLATFORMS	34
FUNCTION 1   TRACK	35
FUNCTION 2   ALIGN	35
FUNCTION 3   NEGOTIATE	36
FUNCTION 4   CHANNEL (OPTIONAL)	36
BLENDED FINANCE FOR ADAPTATION	37
POOLED FUNDS AND PROGRAMMATIC BUDGETING	38
THREE REALISTIC FINANCE INTERFACE MODELS	38
THE ROLE OF NATIONAL INSTITUTIONS AND THE PRIVATE SECTOR	40
<i>NATIONAL DEVELOPMENT BANKS AND CLIMATE FUNDS</i>	40
<i>PRIVATE SECTOR ENGAGEMENT</i>	40
<i>CASE STUDY: MADAGASCAR — INNOVATIVE RESILIENCE FINANCE</i>	42



## **5. PIPELINE DEVELOPMENT AND INVESTMENT PLANNING** | DEVELOPING BANKABLE PROJECTS AND INVESTMENT PLANS ALIGNING WITH NATIONAL NEEDS **44**

WHAT CAN THE COUNTRY PLATFORM CO-ORDINATE? PLANS, PORTFOLIO AND PIPELINE **45**

LINKING TO NATIONAL PLANS AND BUDGETS **46**

PROJECT PREPARATION FACILITIES AND FEASIBILITY SUPPORT **46**

PRIORITISATION AND SCREENING OF PROJECTS **47**

*ESG SCREENING* **48**

*LINKING TO BUDGETS AND PHASING* **48**

*CASE STUDY EXAMPLES: COLOMBIA AND VANUATU* **49**



## **6. LEARNING, MONITORING AND SCALING** | ADAPTATION, CONTINUOUS IMPROVEMENT AND SUSTAINABILITY **51**

MONITORING, EVALUATION AND LEARNING FRAMEWORKS **52**

CONTINUOUS LEARNING AND SOUTH-SOUTH KNOWLEDGE EXCHANGE **53**

SCALING AND LONG-TERM SUSTAINABILITY STRATEGIES **54**

*CASE STUDY: LIFE-AR'S ADAPTIVE LEARNING AND SCALING APPROACH* **56**

ADDITIONAL RESOURCES **58**

APPENDIX — TOOLKIT WORKBOOK **59**

# ABBREVIATIONS

Abbreviations	Meaning
AF	Adaptation Fund
AFD	French Development Agency
AfDB	African Development Bank
CSO	Civil society organisation
E&S	Environmental and social safeguards
ESG	Environmental, social, and governance
FONERWA	Rwanda Green Fund
GCF	Green Climate Fund
GEF	Global Environment Facility
GIF	Global Infrastructure Facility
IFC	International Finance Corporation
IMF	International Monetary Fund
INFF	Integrated National Financing Framework
JETP	Just Energy Transition Partnership
L&D	Loss and damage
LIFE-AR	Least Developed Countries Initiative for Effective Adaptation and Resilience
LoCAL	Local Climate Adaptive Living Facility
LTS	Long-term low emissions development strategies
MDB	Multilateral development bank
MEL	Monitoring, evaluation and learning
MTEF	Medium-term expenditure framework
NAB	Vanuatu's National Advisory Board on Climate Change and Disaster Risk Reduction
NAP	National adaptation plan
NCC	National Climate Commission
NDB	National development bank
NDC	Nationally determined contribution
NDP	National development plan
NWFE	Nexus of Water, Food and Energy (Egypt's country platform)
ODA	Official development assistance
PFM	Public finance management
PIP	Public investment programme
PMO	Programme management office
RSF	Resilience and Sustainability Facility (the operational arm of the RST)
RST	Resilience and Sustainability Trust
SDG	Sustainable Development Goal
UNFCCC	The United Nations Framework Convention on Climate Change

# INTRODUCTION

## CONTEXT AND PURPOSE OF THE TOOLKIT

Countries on the front lines of climate change are grappling with increasingly severe impacts and a growing need for higher-quality, predictable finance so that they can respond effectively. However, climate finance flows are currently more uncertain than ever. Despite new pledges, funds and initiatives, many least developed countries (LDCs) and Small Island Developing States (SIDS) still experience climate finance as fragmented, slow and misaligned with their own priorities. As a result, ministries and local governments spend valuable time managing multiple small projects instead of driving a coherent, long-term transition.

The Climate and Development Ministerial (C&DM) process was created to tackle this problem head-on: to move from high-level promises to country-led, programmatic delivery. Under Goal 1 — advancing programmatic, country-led approaches to climate and development finance — ministers and practitioners have repeatedly converged on one central idea: country platforms (CPs) can be a powerful organising mechanism, if they are genuinely country owned and well designed.

In recent years, LDCs and SIDS have begun to experiment with different platform models — from Vanuatu’s adaptation, loss and damage (L&D) platform, to the Rwanda Green Fund (FONERWA) and the Least Developed Countries Initiative for Effective Adaptation and Resilience (LIFE-AR) platforms for ‘front-runner’ countries.

The paper, ‘The realities of country platforms for LDCs and SIDS: ten key lessons’<sup>i</sup> and the outcomes from the 2025 Sevilla technical workshop<sup>ii</sup> captured both the promise and the pitfalls of these early efforts. They showed that when platforms are grounded in national systems, anchored in strong political leadership, and designed for inclusion and learning, they can:

- Reduce fragmentation and transaction costs
- Align diverse public, private and multilateral finance with national strategies
- Strengthen locally led adaptation and resilience, and
- Build negotiating power with funds and development banks.

They also showed that when platforms are launched without readiness, mandate or institutional support, they risk both becoming simply another co-ordination forum which has little practical impact, and duplicating existing efforts.

The Country Platforms Action Toolkit responds directly to these findings. It translates the political commitment under C&DM Goal 1 into practical, step-by-step guidance for countries that want to design, strengthen or refresh a CP for climate and development finance.

---

<sup>i</sup> Gul, M, Holland, E, Hassan, A and Upson, L (2025) The realities of country platforms for LDCs and SIDS: ten key lessons. Climate and Development Ministerial. <https://www.iied.org/22630g>

<sup>ii</sup> The C&DM Technical workshop on country platforms was held in June 2025 in Sevilla, where a range of stakeholders from governments, multilateral development banks, climate funds, civil society and philanthropy were convened.

# WHAT THIS TOOLKIT IS — AND IS NOT

This toolkit is a practical guide for action, not a new theory of CPs. It is written for practitioners who are already grappling with very real constraints: limited staff time, complex politics, donor pressures and debt concerns, and communities facing urgent climate impacts.

It is:

- Country-led in perspective, written primarily from the vantage point of ministries of finance and planning, climate and environment agencies, and local governments in LDCs and SIDS.
- Programmatic and systems oriented: focused on shifting from project-by-project approaches to coherent, mission-oriented portfolios aligned with nationally determined contributions (NDCs), national adaptation plans (NAPs), national development plans (NDPs) and, where relevant, just transition pathways.
- Practice based: grounded in lessons from early movers (for example Rwanda, Vanuatu, Uganda/LIFE-AR, Madagascar, and Colombia) and the collective intelligence of the C&DM community, including the Champions Group on Adaptation Finance and

partners such as the NDC Partnership, the Vulnerable Twenty (V20) Group, 2050 Pathways Platform and multilateral development banks (MDBs).

- Modular: designed so countries can start from where they are on the ‘platform escalator’: from an initial readiness conversation to platform (re)design, to financing, pipeline development, and long-term learning and scaling.

It is not:

- A prescriptive ‘one-size-fits-all’ blueprint. Countries should adapt, combine or skip elements to fit their context.
- A donor-led results framework (although it can help development partners align better with country-led processes).
- A substitute for political leadership, institutional reform or hard fiscal choices: those remain essential and context specific.

## WHO THE TOOLKIT IS FOR

The primary audience is national and subnational decision makers and practitioners in LDCs and SIDS who are considering, designing or refining a CP, including:

- Ministries of finance and economy, planning, environment/climate, local government and key sector ministries
- CP secretariats or co-ordination units (existing or emerging)
- National development banks (NDBs), climate funds and other domestic financial institutions
- Local government associations and decentralised climate finance practitioners, and

- Civil society networks, Indigenous Peoples’ organisations, youth groups, and private sector coalitions engaged in climate and development finance.

A secondary audience includes development partners — for example multilateral climate funds, MDBs, bilateral agencies and philanthropies — who are seeking to support CPs in ways that respect country ownership and avoid duplicating or distorting national systems.

# HOW THE TOOLKIT IS STRUCTURED

The toolkit is organised into six interconnected modules, each with concise guidance, practical worksheets and reflection exercises.

*Countries do not need to follow them strictly in order; instead, they can dip into the parts most relevant to their current stage.*



## 1. Start with your reality

Before diving into platform design, this module helps countries take stock of what already exists. By producing a baseline of what is already in place — and identifying where gaps or duplication risks lie — this module ensures that the design of CPs builds on existing structures and accelerates implementation rather than creating parallel or redundant arrangements.



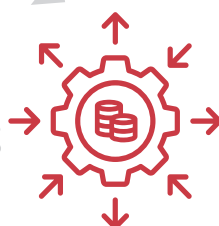
## 2. Diagnostic and readiness

Helps countries decide if a platform is the right tool at the current time. It offers a structured readiness diagnostic — across politics, institutions, stakeholders and finance — and introduces basic platform typologies and the 'readiness spectrum'. The emphasis is on reaching an honest conclusion which could be 'yes', 'yes but not yet', or 'no — an alternative mechanism is better'.



## 3. Governance and institutional architecture

Focuses on who decides what, how institutions fit together, and how inclusion and accountability are built into a CP. It covers political anchoring, mandates and legal basis; steering committees, secretariats and working groups; whole-of-government and whole-of-society participation; and the practical 'plumbing' of co-ordination.



## 4. Financing and financial architecture

Addresses where the money comes from, how different instruments are combined, and how finance is aligned with national priorities. It explores blended finance for adaptation, pooled funds and 'families of funds', the role of NDBs and domestic financial institutions, and approaches to crowding in private sector investment while maintaining debt sustainability.



## 5. Pipeline development and investment planning

Translates national climate and development plans into coherent investment pipelines. It covers linking pipelines to NDCs, NAPs and budgets; using project preparation facilities; assessing project readiness; prioritising and screening projects with transparent criteria, including environmental social governance (ESG) safeguards; and sequencing investments in line with capacity and fiscal realities.



## 6. Learning, monitoring and scaling

Positions CPs as adaptive systems rather than one-off projects. It provides guidance on monitoring and evaluation (MEL) frameworks focused on resilience outcomes and systems change; participatory monitoring and feedback loops; peer learning and South–South exchange; and strategies to embed and scale platforms through law, budgets and institutional culture. The LIFE-AR experience in Uganda and other LDCs features prominently as an example of 'learn early, learn always'.

# HOW TO USE THIS TOOLKIT


There is no single 'correct' way to use the Country Platforms Action Toolkit. Here are a few practical suggestions:

- **Start from your reality, not from the beginning of the toolkit.** Use the modules to interrogate and support existing structures, not to impose a new model for its own sake. Many countries already have parts of a platform — for example a climate fund, a co-ordination council or an NDC investment plan — that can be strengthened and connected.
- **Use the diagnostic tools in the workbook to have honest conversations.** The CP Principles Audit (**Worksheet 2.1**) and reflection exercises in the workbook are designed to identify gaps and political risks early. It is better to slow down and fix those before continuing than to rush into a high-profile launch that cannot be sustained.
- **Co-create with stakeholders.** Many worksheets are intended for use in mixed groups, for example those containing finance and planning officials, line ministries, local government, civil society, private sector or development partners. The process of completing them together is often as valuable as the actual outputs.
- **Treat the toolkit as a living resource.** Platforms should evolve as circumstances change (for example new funds, debt stress, political shifts or shocks such as major climate events). The toolkit can be revisited periodically — for example ahead of NDC updates, budget cycles or major replenishments — to refresh governance, finance architecture or pipelines.
- **Connect back to C&DM and other forums.** As your platform develops, the lessons and evidence generated can feed back into C&DM Goal 1 dialogues, the Champions Group on Adaptation Finance, the Coalition of Finance Ministers, and United Nations Framework Convention on Climate Change (UNFCCC) processes. This helps shape international reforms in ways that respond to the realities faced by LDCs and SIDS.

Ultimately, the Country Platforms Action Toolkit is an invitation to design platforms that are of the country, for the country, and capable of shifting climate and development finance from fragmented projects to coherent, long-term, locally led action. It offers tools and examples, but the real innovation will come from how you adapt, test and improve these ideas in your own context.



This is an **interactive document**.

When you hover over content and this icon  appears, it means that the content is linked to other information within this document.



# 1. START WITH YOUR REALITY

*AVOID DUPLICATION*

**Module purpose:** before designing or redesigning a CP, countries should begin with a disciplined assessment of what already exists.

Many LDCs and SIDS already have significant climate governance infrastructure in place: NAPs, NDCs, long-term low emissions development strategies (LTS), sector plans, climate funds, donor co-ordination groups, integrated national financing frameworks (INFFs), climate budget tagging systems or NDBs.

## WHY CONSIDER A COUNTRY PLATFORM?

A CP is generally defined as a nationally owned co-ordination framework that brings government, donors, private sector and civil society together behind a shared investment strategy and national priorities. In practice, this means moving away from fragmented, donor-driven projects to a *programmatic* approach aligned to country-led plans. CPs aim to channel diverse finance — public, private, multilateral, philanthropic — into a unified pipeline of projects and reforms, often linked to a country's climate strategies (NDCs, NAPs, LTS and so on).

For climate-vulnerable countries, the appeal of CPs lies in tackling the well-known frustrations with the status quo: high transaction costs of dealing with many small projects, difficulty accessing climate funds, and lack of co-ordination leading to gaps and overlaps. A CP offers a *'one-stop' platform* to align support with the country's own goals, potentially speeding up finance delivery and strengthening country ownership of climate action. For

example, past experiences from Rwanda and Mozambique showed that strong country-led frameworks helped ensure donor support aligned to long-term national plans, yielding faster development gains.

However, a CP is not a silver bullet and is not automatically the right tool for every context. CPs should be approached as a *learning journey, not a default prescription* — countries must *diagnostically test* whether the CP model suits their specific needs and capacities. If platforms are launched in contexts where they cannot deliver (for example without political backing or where they have minimal capacity), they risk underperforming and causing disappointment.

## WHERE TO START?

Experience shows that platforms fail when they are built 'on top of' existing systems without understanding them. They risk becoming:

- Another co-ordination forum with overlapping mandates
- A new investment plan that competes with NDC or NAP processes

- A donor-driven structure disconnected from national budgeting, or
- A technically sound design that lacks political or institutional traction.

By starting with a structured reality check, countries can design platforms that are lighter, smarter and more integrated.

# STEP 1 | MAP EXISTING PLANS AND STRATEGIES

The first exercise is to identify and understand the core national frameworks already guiding climate and development finance.

These may include:

- NDC Nationally determined contribution (NDC)
- NAP National adaptation plan (NAP)
- Long-term low emissions development strategies (LTS)
- National development plan (NDP)
- Sectoral strategies (energy, agriculture, infrastructure, water and so on)
- Just transition strategies (where relevant)
- Integrated National Financing Framework (INFF)

- Climate budget tagging or green budgeting frameworks
- Public investment programme (PIP), and
- Medium-term expenditure framework (MTEF).

## Key questions:

- Are climate priorities clearly costed?
- Is there already an NDC or NAP investment plan?
- Are projects linked to national budget systems?
- Is there a defined pipeline of priority investments?
- Are climate actions embedded in economic planning, or treated as a parallel agenda?

# STEP 2 | MAP INSTITUTIONS AND CO-ORDINATION MECHANISMS

The next step is to assess the institutional landscape. Countries often already have:

- Inter-ministerial climate committees
- National climate councils
- Donor roundtables
- National climate funds or green funds
- National development banks (NDBs)
- Decentralised climate finance mechanisms
- Disaster risk reduction committees, or
- Budget committees or public investment appraisal bodies.

## Key questions:

- Who currently convenes climate finance discussions?
- Where does authority sit — finance? Planning? Environment? Programme management office (PMO)?
- Are mandates clear or overlapping?
- Are local governments and civil society formally engaged?
- Are private sector actors involved meaningfully?
- Are there co-ordination forums that work well and should be strengthened?

# STEP 3 | MAP FINANCE FLOWS

A CP adds most value when it improves transparency and alignment of finance flows. Therefore, a baseline understanding of flows is essential.

## International public finance

- Bilateral official development assistance (ODA)
- Multilateral development banks (MDBs)
- Climate funds, for example Green Climate Fund (GCF), Adaptation Fund (AF), Global Environment Facility (GEF)
- International Monetary Fund (IMF) climate facilities, for example the Resilience and Sustainability Facility (RSF).

## Domestic public finance

- National budget allocations
- Climate budget tagging data
- Earmarked revenues or levies
- Public investment programme allocations.

## Intermediated and off-budget flows

- Multi-donor trust funds
- National funds operating semi-autonomously
- NGO-managed climate programmes
- Philanthropic initiatives.

## Private sector flows

- Domestic bank lending
- Foreign direct investment in climate sectors
- Blended finance vehicles
- Insurance and risk transfer mechanisms.



### Key questions:

- Is there a consolidated view of these flows?
- Are finance gaps clearly identified?
- Are there duplications or overlaps?
- Do finance flows reflect national priorities?
- Are subnational allocations visible and tracked?

# STEP 4 | DUPLICATION CHECK — WHAT WOULD A COUNTRY PLATFORM ADD?

With this mapping completed, the final and most important question is:

## *What would a CP do that existing mechanisms cannot?*

Possible answers might include:

- Improve transparency of climate finance flows
- Reduce transaction costs across donors
- Strengthen negotiation power with MDBs
- Link NAP/NDC investment plans to budgets
- Provide a structured pipeline governance process
- Formalise stakeholder inclusion
- Co-ordinate blended finance strategies, or
- Embed learning and accountability mechanisms.

If the mapping reveals that:

- Strong co-ordination already exists
- Finance alignment is functioning
- Pipelines are governed effectively, and
- Stakeholder inclusion is structured,

then a full CP may not be necessary. Strengthening existing mechanisms could be more efficient.

Conversely, if fragmentation, duplication and transaction burdens are evident, then a CP may offer substantial added value.

Uganda steering committee meeting in Kibaale District.  
Credit: Life-AR Uganda





## 2. DIAGNOSTIC AND 2. READINESS FOR COUNTRY PLATFORM DEVELOPMENT



## Workbook | Module 2

In the Country Platform Action Toolkit Workbook, there are practical exercises to help you apply the knowledge gained from this module.

**Worksheet 2.1:** country platform principles audit

**Reflection exercise 2.1:** is a country platform right for us?

**Module purpose:** this module helps LDCs and SIDS determine when and why to pursue a CP approach for climate finance, and equally importantly, when alternative approaches might be more suitable. It offers a candid diagnostic of entry conditions – political, institutional and financial – needed for a CP to succeed, and provides tools for self-assessment. The goal is to give countries an honest, empowered basis from which to decide if a CP fits their context and what support is needed to move forward.

## ENTRY POINTS | TRIGGERS FOR CONSIDERING A CP

What prompts a country to consider establishing a CP? If the country feels like ‘yes, a platform could be right for us,’ it’s critical to consider readiness across several dimensions. Experience and research show that four foundational elements determine whether a CP can take off and perform well. These mirror some of the diagnostic questions but are worth reinforcing as areas to evaluate.



### 1. Political will and high-level leadership

A successful CP needs clear political ownership. The decisive factor is whether top leadership is willing to champion the platform and signal it as a national priority. This includes:

**Visible high-level endorsement.** When the head of government of a particular country signals support, it legitimises the platform across ministries and encourages whole-of-government co-operation. It also helps ensure policy coherence across sectors.

**A clear mandate and authority.** Political commitment must be formalised through a decree, resolution or similar instrument that establishes the platform and empowers a strong co-ordinating body to lead it.

**Alignment with long-term vision.** The CP should be anchored in national strategies for climate resilience and development. Leaders must be willing to back the policy and institutional reforms that the platform identifies.



**Core question:** is senior political leadership ready to back the platform in a visible way and sustain that commitment beyond short-term political cycles?



## 2. Institutional anchoring and capacity

Equally important is where and how the platform is embedded institutionally. A CP will flounder if it's set up as a parallel ad hoc unit with no leverage, or if it lacks capable people and systems. Key considerations might include:

**Strong institutional home.** Anchoring the CP in a ministry or office with cross-government authority — such as finance, planning or the PMO — ensures it is connected to national planning and budgeting rather than operating as an isolated project unit.

**A capable secretariat.** A small, dedicated team must manage daily co-ordination: convening ministries and partners, developing investment plans and pipelines, and monitoring progress. Early phases may blend government staff and technical advisors, but sustained capacity building is essential. For example, countries in the LIFE-AR programme set up small secretariats often hosted by the environment ministry but which worked closely with finance ministry liaisons.

**Clear, streamlined governance.** A high-level steering committee should provide strategic direction, supported by technical working groups for sectoral or financial issues. Clear roles and decision-making rules help maintain accountability without creating heavy bureaucracy.

**Credible fiduciary and administrative systems.** Because CPs mobilise and channel significant funds, public financial management systems must be able to receive, track and report on climate finance. Where gaps exist, transitional use of an existing fund or mechanism can help while systems are strengthened.



**Core question:** are the institutions, people and systems in place — or can they be strengthened quickly — so the CP can operate as an integrated part of government rather than a standalone project?



## 3. Stakeholder coherence and inclusive ownership

A CP must embody a whole-of-society approach to truly succeed. This means breaking down not just inter-ministerial silos, but also ensuring non-governmental stakeholders are meaningfully involved. Key points:

**Structured multi-stakeholder engagement.** Civil society, private sector, academia, local authorities and communities should have defined roles in the platform's design and governance, not only in consultation processes. For example, South Africa's Just Energy Transition Partnership (JETP) process featured consultations with labour unions and civil society as part of its 'just transition' commitment. LIFE-AR platforms explicitly centre *locally led adaptation (LLA) principles*,<sup>iii</sup> creating space for community and youth input from the start. Inclusivity is not just 'nice to have' — it builds legitimacy and taps local knowledge.

**Meaningful subnational participation.** Local governments and community-level actors need space to feed priorities into national decisions. Clear channels for bottom-up input help ensure investments respond to actual needs. Vanuatu's emerging platform, for instance, reportedly integrates community climate committees into its structure, ensuring that local needs in remote islands inform funding priorities. Some countries may institute local steering committees or use existing decentralisation channels to funnel resources, as seen in the Local Climate Adaptive Living (LoCAL)<sup>iv</sup> programme.

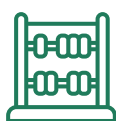
<sup>iii</sup> IIED (nd), Principles for Locally Led Adaptation. <https://www.iied.org/principles-for-locally-led-adaptation>

<sup>iv</sup> The Local Climate Adaptive Living Facility helps local government authorities in LDCs and other developing countries access the climate finance, capacity-building and technical support they need to respond and adapt to climate change.

**Shared vision and trust building.** A common understanding of what the CP aims to achieve — and how decisions will be made — is essential. Transparent communication fosters trust and encourages active participation.

**Managing power imbalances.** Deliberate attention must be given to ensuring no single ministry, donor or interest group dominates. ‘Locally led’ must genuinely mean that local actors have influence, not token presence. This may require supplying capacity support to weaker stakeholders (for example training civil society representatives to engage in finance discussions, or providing space for Indigenous groups to formulate inputs).

**Core question:** are the key actors — national and local — willing and able to engage in a shared platform, and is there enough trust and clarity to make inclusive governance work?



## 4. Financing strategy and co-ordination of finance

Finally, a CP is only as effective as its ability to mobilise and align finance. Thus, a critical readiness consideration is the state of the country’s financing strategy for climate actions:

**Unified investment plan or pipeline.** Countries need a coherent plan outlining priority projects over several years, linked to climate and development goals. Platforms like Colombia’s green investment pipeline show how structured project lists with estimated costs guide partner co-ordination and signal readiness to absorb funds. Without this clarity, funders may struggle to engage.

**Capacity to blend and structure finance.** CPs often use a mix of grants, concessional loans, guarantees and private capital. Teams must match instruments to needs, for example grants for community adaptation, loans for resilient infrastructure, and guarantees to de-risk private investment in energy or coastal projects. MDBs and advisors can help structure these instruments where capacity is still building.

**Early donor alignment and modalities.** Engaging major donors and MDBs early clarifies willingness to co-ordinate or pool contributions. Some countries leverage existing funds — for example FONERWA, or Fiji’s Climate Relocation Fund — to channel partner contributions while the platform matures. GCF readiness grants, AF resources and philanthropic funds can provide early seed financing.

**Macro-fiscal context and debt considerations.** Debt distress or fiscal constraints can limit financing options. Platforms may be paired with fiscal measures such as the IMF’s Resilience and Sustainability Trust (RST) support or debt-for-climate swaps. Reflecting climate priorities in medium-term expenditure frameworks signals domestic commitment to funders.

### Systems for tracking, reporting and learning

Mechanisms to track finance, report transparently and demonstrate results — for example budget tagging, dashboards or integration with national MEL systems — increase confidence and can attract additional resources.

**Core question:** is there a coherent investment plan, the capacity to blend and co-ordinate diverse financing instruments, and fiscal and reporting systems that give partners confidence to channel resources through the platform?

## Alternatives

A platform needs a solid financing game plan: know your needs, know your potential sources, and have systems to blend and co-ordinate those flows. Readiness is as much about financial planning as it is about institutional setup. If your country lacks a climate finance strategy, developing one should precede or coincide with platform development.

If none of these triggers is present, a full-fledged CP may not be timely. Countries can still improve co-ordination through existing mechanisms (for example strengthening a climate change donor roundtable, or integrating climate into an INFF without creating a new platform. The CP approach should answer a real need or opportunity, and not started for its own sake.

In practice, countries do not need to choose between having no platform and a full-fledged CP from the outset. A phased approach can allow governments to match ambition to readiness, starting with co-ordination and gradually scaling up as political support, institutional capacity, stakeholder trust and financing systems strengthen.

### Co-ordination-first country platform (low-budget entry option)

In this phase, the CP functions primarily as a co-ordination and alignment mechanism, rather than a full financing vehicle. Typical features include:

- A light secretariat embedded within an existing ministry or co-ordinating body, with modest staffing and operating costs.
- Focus on policy coherence, donor and partner co-ordination, and development of a shared investment plan or pipeline, rather than direct fund management.
- Use of existing financing channels or national funds to receive and disburse resources, avoiding the immediate need for new fiduciary arrangements.
- Emphasis on stakeholder engagement and trust building, including structured participation of subnational actors, civil society and the private sector.
- Early deliverables such as agreed co-ordination principles, priority investment pipelines or common monitoring frameworks.

This co-ordination-first model is particularly appropriate where political commitment exists, but institutional capacity, financing systems or stakeholder cohesion are still emerging.

See the below decision tree as a practical step-by-step guide to deciding your country's potential to adopt a CP.

⊗ No

☑ Yes



### Why consider a CP?

Fragmented climate finance or donors?  
Cross-sector climate and development goals?  
Window of political or financing opportunity?

**CP not necessary at this stage**  
Instead strengthen existing co-ordination mechanisms

**Step 1: political will**  
Visible leadership support?  
Formal mandate and authority?  
Alignment with national long-term vision?



**Not ready for a CP**  
Build political alignment first  
Develop long-term national goals and policies

**Step 2: institutional anchoring and capacity**  
Strong institutional home?  
Capable secretariat?  
Clear governance structure?  
Credible fiduciary standards?



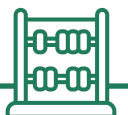
**High risk for CP**  
Strengthen institutions and systems first

**Step 3: stakeholder coherence and inclusion**  
Whole-of-society buy-in?  
Subnational participation?  
Trust and shared vision?  
Power imbalances managed?



**CP premature**  
Invest in trust building and stakeholder capacity

**Step 4: financing strategy and co-ordination**  
Coherent investment plan?  
Capacity to blend finance?  
Donor/MDB alignment?  
Fiscal and finance tracking systems?



**Develop foundations first (co-ordination-first CP)**  
Climate finance strategy  
Investment pipelines  
Readiness/seed funding

**Proceed with CP**  
Engage partners early on



# DIAGNOSTIC QUESTIONS | ASSESSING CONTEXT AND READINESS

Before diving into designing a CP, countries should ask themselves some critical diagnostic questions. These help determine if the essential ingredients for a successful platform are in place (or can be developed). Below are key questions and why they matter:

## What are your top climate and development priorities?

A CP must be driven by a clear purpose. Is the focus on economy-wide transformation, or a specific mission like *renewable energy* or *climate adaptation*? For example, Egypt's Nexus of Water, Food and Energy (NWFE) platform zeroes in on water, food and energy security as a bundled priority, whereas Vanuatu is focusing on an adaptation and L&D platform to address climate resilience. Be clear on the problem the CP will solve, for example 'mobilise X amount for adaptation in our five-year plan' or 'co-ordinate all donors behind our net-zero strategy.'

## Is there an institutional 'home' or convening body for the platform?

Consider which ministry or agency would host and co-ordinate the CP. Ministries of finance or planning often provide the strongest anchor, ensuring integration into budgeting and economic policy. Environment or climate ministries are critical partners but may need a mandate from central agencies to convene others. Is there an existing high-level council or task force on climate that could be built upon? Is there a capable team (or the ability to create one) to serve as a CP secretariat, co-ordinating day-to-day work? Institutional readiness — in terms of mandate, staffing and resources — is vital.

## Is there high-level political commitment and leadership?

Successful CPs require backing from the top. Is there a *political champion* (for example a prime minister, president or minister of finance/planning) who will sponsor the platform and drive policy reforms? Platforms work best when *owned and led at the highest political level*, which helps set a bold vision and rally the whole government and society behind the cause. Without this, a CP can languish as a technocratic exercise. Gauge the appetite of your leadership: are they pushing for integrated climate action? Will they empower a CP secretariat or task force? If not, building that political will is a first step.

## Are stakeholders (across government and beyond) willing and able to collaborate?

A CP is by nature *multi-stakeholder* and *cross-sectoral*. Assess the level of trust and co-operation among key players: central ministries, sector ministries, local governments, civil society, private sector and development partners. If your government is very siloed or relations with donors are strained, those issues need addressing for a platform to work. Inclusive engagement is not optional; it's a necessity for legitimacy. Ask whether platforms for stakeholder input (for example civil society forums or private sector roundtables) exist or can be created. Who will represent local communities or vulnerable groups in the platform? Countries should be ready to '*put people at the heart*' of the process — meaning involve those who will implement and benefit from it, not just officials. If this wide buy-in seems unattainable at present, a CP might need to start with a narrower scope or wait until a coalition can be built.



### How well are the country's plans and budgets already aligned with climate goals?

The effectiveness of a CP will rely on having solid national strategies to build on. If climate priorities are already embedded in the NDP, sector plans or budget (for example through climate budget tagging or an INFF), that's a good foundation. If not, this may need to be done first as part of the groundwork. A platform should *complement and enhance national planning*, not exist in a vacuum. Also consider timing: aligning a CP launch with cycles like a new NDP, a mid-term budget framework or an NDC update can create synergy. Conversely, launching a CP in the middle of an election year or without a guiding plan could undermine it.



### What resources and support can be mobilised to kick-start the platform?

It's important to have at least some initial resources or commitments. This could be a modest government budget allocation for a secretariat, a readiness grant (for example from the GCF's Readiness Programme), or a commitment from a development partner to support platform design. If absolutely no funding or technical support is available, it may be hard to initiate a CP. Part of readiness is often securing a small amount of catalytic funding to design the platform architecture and facilitate stakeholder consultations.



### What is the state of project pipelines and investment readiness?

A CP is ultimately a vehicle through which to deliver finance into projects and programmes. Have you identified a pipeline of priority projects or investments (even if they are at concept stage) that the platform can help develop and fund? If a *project pipeline is very thin or non-existent*, initial focus might be on pipeline *development* (for example using project preparation facilities) before large-scale financing. On the other hand, if there is already a long list of projects but no funding, a CP could quickly add value by matching finance to those needs. Assess your *technical capacity* for planning and implementing projects — if it's weak, part of CP readiness is securing technical assistance to build that capacity.



### Could an alternative approach achieve the country's goals more simply?

Finally, critically ask if a CP is the *best approach* for what you need. There may be cases where focusing on a specific programme or bilateral deal is more practical. For instance, if your primary goal is to finance one large infrastructure project, negotiating a direct loan or grant might be faster than establishing a whole platform. Or if institutional capacity is extremely low, it might be prudent to invest in capacity building first (possibly via a smaller programme) and postpone the CP idea. Use this question to guard against jumping on the CP 'bandwagon' without a clear value-add. A CP should only be pursued if it clearly improves on other ways of working.



### Are there existing co-ordination structures that a CP would build on or replace?

Map what's already there. Some countries may have climate change donor co-ordination groups, sector working groups or climate investment funds. A CP shouldn't *duplicate* effective mechanisms; it should strengthen or streamline co-ordination. If an existing structure (say a multi-donor trust fund or a national climate council) largely fulfils the role, consider whether tweaking it might be a better use of time and resources than creating a whole new platform. On the other hand, if efforts are fragmented across many forums, a CP can provide an overarching umbrella through which to unify them.

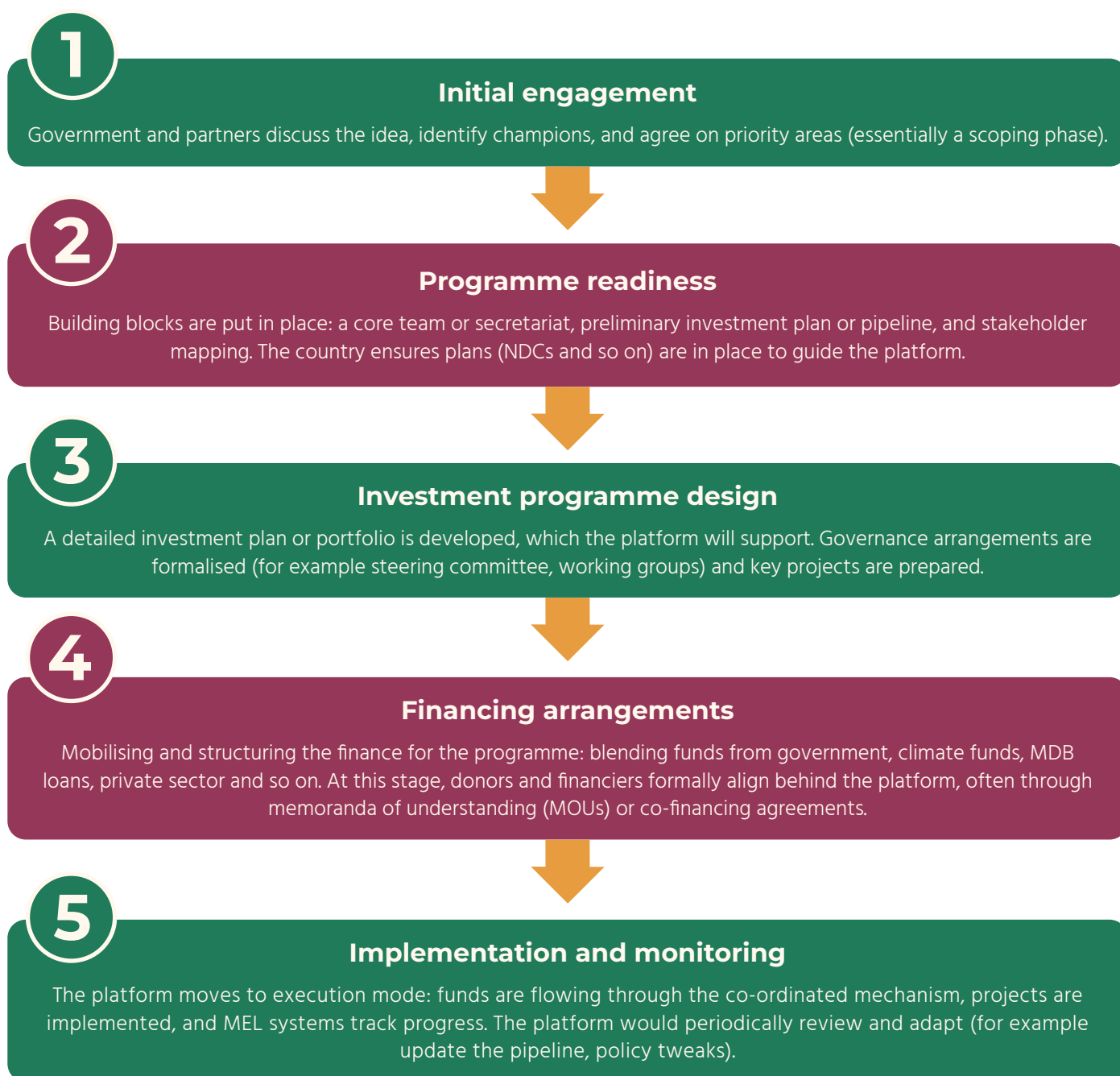
These diagnostic questions can be compiled into a 'readiness questionnaire' that stakeholders can fill out. An honest look at the answers will indicate whether the basic entry conditions for a CP exist or what gaps need closing. In some cases, the conclusion might be *'not yet'* — which is perfectly fine. The remainder of this module assumes you identify a sufficient rationale to decide to explore a CP, and it guides you through assessing what type of platform and what level of readiness you have.

# COUNTRY PLATFORM TYPOLOGIES AND THE READINESS SPECTRUM

Not all CPs look alike. In fact, one size does not fit all — platforms can take various forms depending on a country’s goals and circumstances. It’s useful to understand these typologies because one of the earliest decisions to make is which style of platform best suits your context:

Type of platform	Description	Examples	Strengths	Risks/ Considerations
<b>Comprehensive national platforms</b>	Broad, cross-sectoral frameworks aligned with NDPs or whole-of-government climate strategies. Address climate and development holistically through strong central co-ordination.	Bangladesh Climate and Development Partnership (BCDP) (Ministry of Finance-led), integrating climate finance into economic planning and cross-ministerial co-ordination.	Holistic approach; strong national ownership; integrates climate with economic planning.	Requires strong central co-ordination; complex to manage; risk of slow progress if governance capacity is weak.
<b>Thematic or sectoral platforms</b>	Focus on a specific sector or theme where political momentum and finance are concentrated; can later expand or inspire broader national platforms.	Egypt’s NWFE; JETPs (South Africa, Indonesia, Vietnam).	Clear mission focus; easier to mobilise stakeholders and finance; politically attractive.	Risk of siloing; must link back to national climate goals and broader development strategies.
<b>Fund-based platforms</b>	A national climate fund or trust fund becomes the nucleus of a platform, pairing financing mechanisms with co-ordination structures.	Rwanda’s FONERWA; Bangladesh Climate Change Trust Fund (BCCTF); Ethiopia’s Climate-Resilient Green Economy (CRGE) Facility.	Established governance and fiduciary systems; scalable financing; clear institutional home.	Risk of becoming only a disbursement mechanism rather than a true co-ordinating platform; needs strong stakeholder integration.
<b>Coalition or programmatic platforms</b>	Multi-stakeholder coalitions or programmatic initiatives driving shared long-term agendas; often anchored in partnerships and principles such as LLA.	LIFE-AR; LoCAL.	Flexible and principles-driven; strong focus on learning, local leadership, and long-term capacity; inclusive.	Can sit outside formal government systems initially; requires deliberate integration over time to avoid fragmentation.

It can be helpful to locate your country on a CP development spectrum. Many experts conceive of an escalator or maturity model for these sorts of platforms. For instance, five stages of platform development can include:



Not every country will go stepwise through these stages – some may already have a fund (Stage 4) and then work backwards to broaden stakeholder engagement (Stage 1–2). Others might stall between stages if financing doesn't materialise. The key is to identify where the country is currently on this escalator. For example, in 2024 Madagascar's Climate Finance Mobilization Platform had progressed through the design stage and was organising innovative instruments such as 'lemur bonds', moving into the financing stage. Meanwhile, a country just starting out in this process (say, considering a platform for the first time post-COP30) would be at Stage 1.

By recognising their typology and stage, each country can tailor their method. Some countries might opt for a phased approach: for example they might start with a thematic platform as a pilot (with an energy or adaptation focus), and expand it into a comprehensive platform later – essentially climbing the escalator over time. The *readiness spectrum* also helps set realistic expectations internally and with partners about what comes next.

# Case study: Vanuatu – Prioritising adaptation and loss and damage through a national platform



## Context

Vanuatu, a SIDS extremely vulnerable to cyclones and sea-level rise, faced highly fragmented climate aid, especially for adaptation and L&D needs after disasters. After back-to-back cyclones in the early 2020s, the government realised a more co-ordinated mechanism was needed to channel climate finance into community-level resilience and recovery. This led to the idea of a dedicated adaptation and L&D CP.

## Platform approach

Vanuatu's platform (still in the early stages as of 2025) is structured around its NAP and a newly developed climate L&D strategy. The platform is championed by the Prime Minister's Office, signalling high-level buy-in, but with implementation leadership by the Ministry of Climate Change Adaptation in co-ordination with the Ministry of Finance. A key feature is the integration of traditional community structures: local *climate resilience committees* feed priorities up to the national platform steering committee. This inclusive design ensures that funding decisions account for needs on outer islands and rural communities, exemplifying the locally led principle.

## Readiness and challenges:

Vanuatu had strong political commitment (climate change is a survival issue for them, and the country was a leading voice globally on L&D). They also had a track record with the Vanuatu National Advisory Board on Climate Change and Disaster Risk Reduction (NAB), which served as a precursor co-ordination body. This meant stakeholder coherence was relatively high — NGOs, donors and government were used to co-ordinating via NAB. However, an identified gap was that of financial capacity: Vanuatu lacked a pooled fund mechanism. To address this, they sought GCF Readiness Programme support to design a trust fund for the platform and train staff in fund management. Early engagement with key donors (Australia, the EU and the GCF) secured pledges of support contingent on the platform's operationalisation.

## Lesson

Start with a clear focus. Vanuatu's decision to target adaptation and L&D (rather than absolutely everything) helped rally partners around an urgent common cause. Their case illustrates that even a small country with limited capacity can pursue a CP if it leverages existing co-ordination structures and secures high-level mandate. It also highlights the importance of *external readiness support* — small states may need an infusion of technical help (which Vanuatu smartly sought) to set up the nuts and bolts of a platform. As the platform moves forward, a watchpoint will be ensuring it can absorb increased finance quickly into projects on the ground.

Vanuatu community planning and engagement.  
Credit: Christopher Bartlett, Ministry of Climate Change, Vanuatu.



# 3. GOVERNANCE AND INSTITUTIONAL ARCHITECTURE

*DESIGNING THE PLATFORM'S  
ENGINE ROOM*





## Workbook | Module 3

In the Country Platform Action Toolkit Workbook, there are practical exercises to help you apply the knowledge gained from this module.

**Worksheet 3.1:** governance roles and TOR builder

**Worksheet 3.2:** equity and inclusion checklist

**Worksheet 3.3:** co-ordination mechanism setup

**Reflection exercise 3.1:** is our governance design fit for purpose?

**Module purpose:** this module focuses on how to design the governance and institutional architecture of a CP so that it actually works in practice. The emphasis is on who decides what, how institutions fit together, and how inclusion and accountability are built in from the outset. The aim is not to create a perfect diagram on paper, but a system that is simple enough to function, strong enough to matter and flexible enough to evolve.

## PURPOSE AND DESIGN PRINCIPLES

Governance for a CP should do three things well:

- 1. Provide clear direction and authority** — there should be a recognised body that can set priorities, endorse pipelines and speak to partners on behalf of the country.
- 2. Organise institutions into a coherent architecture** — high-level leadership, a capable ‘engine room’, and technical bodies that prepare and implement decisions.
- 3. Embed inclusion, accountability and rights-based localisation** — in practice this means encouraging government-wide participation and creating structured roles for non-state actors and local communities, with transparent, explicit decision rights and channels for elevating local priorities.

If any of these three are missing, platforms tend to drift into informal co-ordination groups with limited impact.

## POLITICAL ANCHORING, MANDATE AND LEGAL BASIS

The first design choice is where the platform’s political centre of gravity will sit. This will usually be within a body with enough authority to convene others and enough responsibility for the public purse to connect climate investments to development and fiscal policy. In many

countries this is the ministry of finance or planning, sometimes in partnership with the prime minister’s or president’s office, or a national climate council.

Once the political anchor is chosen, its role needs to be made explicit. Examples of questions that might be useful to ask at this stage include:

- Who is the formal chair of the platform’s steering committee?
- Who approves the annual workplan and investment strategy?
- Who signs off major climate finance offers?
- Who represents the country externally?

A clear mandate also needs a formal basis. This does not always require a new law, but there should at least be a

written government decision — for example, a cabinet resolution or ministerial decree — that:

- Establishes the core governance bodies (for example the steering committee and secretariat),
- Defines their authority in relation to existing institutions, and
- Confirms reporting lines (for instance, to the cabinet or a national climate council).

Over time, countries may choose to incorporate the platform into a climate change act, public financial management regulations or a national climate policy. The important point is that the platform’s authority does not rest only on personalities; it is grounded in institutional rules.

## GOVERNANCE BODIES AND ROLES

Most CPs adopt some variation of a three-layered architecture:



### 1. Steering committee or board sets direction and approves major decisions

The steering committee should be small enough to be effective, but broad enough in scope to reflect the main economic and climate decision makers. It typically includes senior representatives from finance, planning, climate/environment and key sector ministries (for example energy, agriculture, infrastructure or local government), and a limited number of non-state actors in full or advisory roles. Its functions usually include endorsing the investment strategy, approving the annual workplan, overseeing results and guiding engagement with partners.



### 2. Technical secretariat runs the platform day to day

The technical secretariat is the ‘engine room’. It prepares the material the steering committee needs to make informed decisions, for example pipeline summaries, analytical briefs and progress reports. It organises meetings, follows up on actions, keeps the project and finance registry up to date, and serves as the main point of contact for development partners and domestic stakeholders. Staff do not need to be numerous, but they do need to have a mix of skills in co-ordination, finance, monitoring, evaluation and learning, and communication.



### 3. Thematic working groups and subnational structures provide technical depth and local linkage

Thematic working groups sit underneath, focusing on specific themes such as adaptation and resilience, mitigation and energy, finance and instruments, or social inclusion and just transition. They draw on experts from line ministries, agencies, research institutions, civil society and the private sector. Their role is to prepare proposals, assess concepts and troubleshoot implementation issues before these reach the steering committee.

Where decentralisation or locally led adaptation is a priority, subnational committees — at provincial, district or community level — can be formally linked into this architecture, with clear channels for elevating local priorities and reporting back on progress.

## TWO GOVERNANCE MODELS

CP governance should reflect a country's readiness, ambition and resource availability. Two broad approaches are common:



### 1. Light governance (co-ordination-first model)

- a. Suitable for early-stage or low-budget entry points
- b. Structure: steering group + small secretariat + working groups
- c. Focus: co-ordination, policy coherence, information sharing and trust-building
- d. Civil society organisations (CSOs) and local actors align and share information rather than being contracted directly, minimising transaction costs while ensuring influence
- e. Early deliverables: agreed co-ordination principles, initial investment pipelines, and monitoring frameworks.



### 2. Full governance (finance + pipeline authority)

- a. Suitable for mature or fully resourced platforms
- b. Features: stronger mandate, formal decision rights, authority over investment pipeline, and governance of pooled funds
- c. Functions: approve allocations, manage risk, co-ordinate blended finance, and oversee both co-ordination and fund management
- d. Stakeholders, including CSOs, private sector and subnational actors, participate in decision-relevant roles, shaping prioritisation, allocations and programmatic approaches.

# SECRETARIAT, CO-ORDINATION AND 'PLUMBING'

Even the most elegant governance diagram can fail in practice if the co-ordination 'plumbing' is weak. The secretariat needs clear routines for the flow of information and decisions through the system.

At minimum, the following should be agreed and documented:

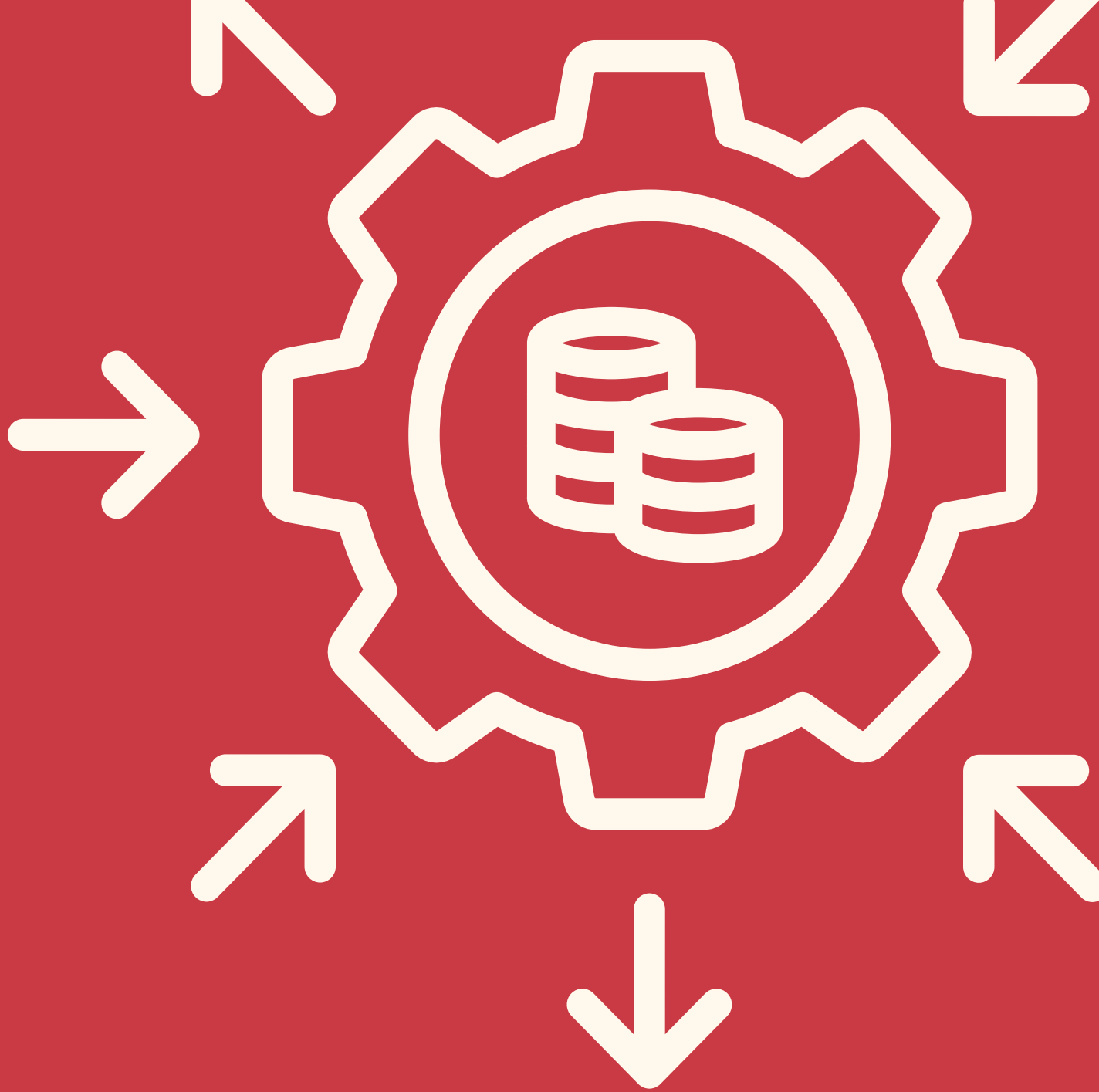
- How often the steering committee meets, who sets the agenda, and how decisions are recorded and communicated
- How working groups submit recommendations, and how these are consolidated by the secretariat before going up for decision

- How subnational bodies or sectoral agencies provide inputs on priorities and report on implementation, and
- How partners (for example development banks, funds, bilateral donors, philanthropies or private investors) engage with the platform: when they present pipelines, how alignment is checked and how overlaps are avoided.

These mechanisms do not need to be complex. What matters is that they are clear, predictable and written down, so everyone knows what to expect and how to engage.

The Gambia LIFE-AR steering committee meeting.  
Credit: LIFE-AR The Gambia





# 4. FINANCE ALIGNMENT AND ARCHITECTURE

*TRACK, ALIGN, NEGOTIATE,  
(OPTIONALLY) CHANNEL*



## Workbook | Module 4

In the Country Platform Action Toolkit Workbook, there are practical exercises to help you apply the knowledge gained from this module.

**Worksheet 4.1:** grant-first prioritisation: where should grants go?

**Worksheet 4.2:** finance mapping canvas

**Worksheet 4.3:** pooled climate fund design sheet

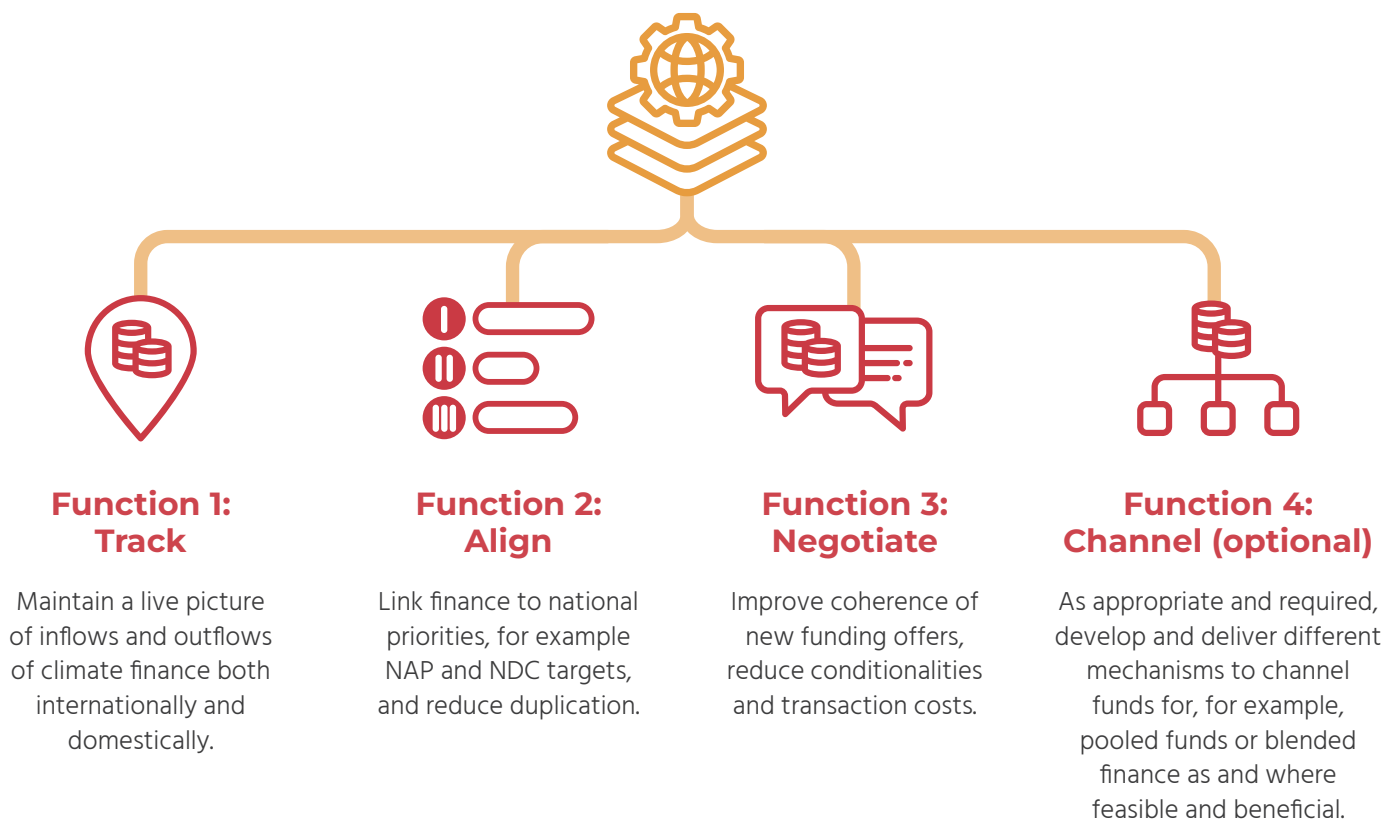
**Reflection exercise 4.1:** is our financial architecture fit for purpose?

**Module purpose:** this module focuses on how to design the financial architecture of a CP: where the money comes from, how it is combined, and how it is channelled as appropriate into priority adaptation and climate-resilient development programmes. The core task is to move from scattered, project-by-project funding to a coherent, country-led system that mobilises diverse sources of finance and allocates them in a strategic, programmatic way.

Adaptation presents particular challenges: many resilience benefits (for example reduced losses, avoided damages or social protection) do not generate direct cash flows. Left to the market, they are systematically under-financed. A deliberate financial architecture is therefore needed to blend instruments, pool resources, and use public and concessional capital to unlock additional funding while maintaining debt sustainability.

# FINANCE FUNCTIONS OF COUNTRY PLATFORMS

The CP could perform different finance functions in the system as below:



This module helps countries make design choices within each function, with a particular focus on adaptation and resilience. A CP's financial architecture can be understood through three interlocking elements:

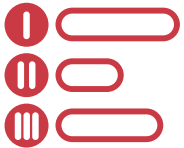




## FUNCTION 1 | TRACK

The CP can perform the function of maintaining a clear and live picture of inflows and outflows of finance in the country, and of finance needs, as well as being able to identify any gaps in finance. Tracking can occur at various levels:

- Country needs and gap analysis. A CP can play an effective role in tracing the country's climate finance requirements and any gaps. The country's NAP, NDC and sectoral plans can form the basis for this.
- Tracking finance flows to the country. This refers to the finance that flows to the country through different international sources, including bilateral and multilateral public sources, and the private sector.
- Tracking finance at national and sub-national level. A CP can track the finance at the national level, including national budget allocations and domestic revenue instruments, and at the subnational level including climate finance flows and expenditure. In addition, a CP can play the function of tracking the flows from CSOs, NGOs and the private sector, which are often missed out in official tracking.



## FUNCTION 2 | ALIGN

The CP links available and incoming finance to national priorities, particularly NAP and NDC targets — reducing duplication and ensuring coherent investment across sectors and funding sources.

### Integration with national systems

- Align the fund with government budgeting and planning cycles. Embedding the fund in the national treasury or public financial management system ensures that external and domestic resources are co-ordinated, fostering sustainability and accountability.
- Examples:
  - Vanuatu channels all major climate finance through the government system, tagged to NDC targets.
  - Rwanda's FONERWA co-ordinates multiple climate finance sources and aligns them with national development goals, ensuring spending is reflected in national accounts and reported to parliament.
- Challenge: some donors prefer off-budget or special accounts. Strategies for reconciling donor requirements with national systems can avoid creating parallel structures.

### Reducing fragmentation and managing fiduciary risk

- Strong fiduciary management and transparency are essential: independent audits, public reporting of expenditures and safeguards against misuse. Example: FONERWA publishes annual audited accounts and underwent independent reviews in its early years to satisfy donors.
- Identify and resolve overlapping or duplicate investments.
- A pooled fund could be a way to reduce fragmentation as it consolidates multiple funding channels, but also creates a single point of accountability.
- The module will provide sample term sheets and design documents, highlighting governance rules, fiduciary standards and monitoring approaches (**see Workbook, Module 4**).



## FUNCTION 3 | NEGOTIATE

The CP can also play a convening role and aggregate finance flows to improve the coherence of new funding offers, reduce conditionalities, and lower transaction costs for both government and partners.

### What negotiation could look like in practice:

- Presenting a unified government position on financing terms to multiple donors
- Negotiating simplified, harmonised reporting requirements across bilateral and multilateral donors
- Positioning for programme-level or sector-wide investments tied to national policy targets and milestones and challenging fragmented project-based funding and conditionalities

- Reducing transaction costs by consolidating appraisal, procurement and audit processes across funding streams
- Prioritising grants for non-revenue resilience/public goods; using blended finance only where a credible revenue or savings stream exists, and
- Leveraging the value of the CP by identifying the small subset of opportunities where blended finance makes sense, and protecting grants for the rest. Private investment potential is limited in many LDCs/SIDS.

Having a credible, government-owned climate finance strategy could enable the negotiation of these terms. Transparent reporting and audit at the country level is also key. Different actors play a role in this which is illustrated further in this module.



## FUNCTION 4 | CHANNEL (OPTIONAL)

Where capacity and political economy allow, the CP develops and delivers mechanisms through which to actively channel finance such as pooled funds, blended finance facilities and national fund windows, as and where these are feasible and beneficial. It should be noted that this function is optional and not all CPs should channel funds. However, the CP should already support the entities at national and subnational levels which may already channel funds in the most effective way that

serves the needs and priorities of climate-vulnerable communities. Either way, this part of the module discusses different options and instruments which could be useful for CPs to channel funds through themselves or to support other entities in doing so.

Below, we discuss blended finance, pooled funds and programmatic budgeting as the key approaches to channelling funds.

# BLENDING FINANCE FOR ADAPTATION

Blended finance refers to financing approaches that combine grants, loans, equity, guarantees and other instruments to support adaptation programmes. By layering different types of capital, countries can de-risk adaptation investments and make them more attractive to investors. A key principle is that public or concessional funds should take on higher risk (for example absorbing first losses), thereby encouraging private sector participation. Rather than relying on a single funding stream, CPs could assemble a portfolio of financing options tailored to the phased needs of adaptation initiatives (for example grant funding for project preparation or pilot phases, and market-based capital for scaling proven solutions).

Some blended finance strategies for adaptation include:

- **Layered capital stacks.** Combine concessional loans or equity with grant-funded first-loss tranches and guarantees to reduce risk for private investors. For example, a development bank or climate fund can provide a junior equity layer or guarantee that will absorb initial losses, thereby protecting senior investors. This kind of risk-tolerant capital (often from public or philanthropic sources) unlocks further private investment by improving the risk-return profile of adaptation projects. In practice, a government might blend a soft loan from an MDB with a grant-funded guarantee or insurance product — if the project underperforms due to climate shocks, the grant facility would cover any losses, giving commercial lenders confidence to lend.
- **Resilience bonds and thematic climate bonds.** Issue bonds earmarked for resilience or adaptation outcomes, tapping into the growing investor appetite for green and social bonds. Resilience bonds, a subset of green bonds, raise capital specifically for climate-resilient investments. These instruments channel funds into projects that strengthen the ability of communities and assets to withstand climate impacts (for example climate-proof infrastructure or ecosystem restoration). Notably, the European Bank for Reconstruction and Development launched the first dedicated resilience bond in 2019, raising US\$700 million with a AAA rating to finance climate-resilient infrastructure. While the green bond market has historically focused on mitigation, new standards (such as the Climate Bonds Initiative's Resilience Bond Principles) are spurring on adaptation-themed bonds. By developing 'adaptation bonds' (often with partial credit guarantees from MDBs or governments),

countries can attract institutional investors to finance adaptation, though care must be taken with debt sustainability for climate-vulnerable nations.

- **Insurance and risk transfer mechanisms.** Use insurance instruments to protect against climate-related losses and thus boost investor confidence. For instance, a country or project can purchase parametric insurance (paying out when a disaster threshold is met) or set up catastrophe bonds whose proceeds fund reconstruction if a climate disaster strikes. These tools allocate risk to parties best positioned to manage it — that is insurers or capital markets — rather than the project sponsors. By capping downside risk (through insurance payouts or contingent finance), adaptation projects become safer investments. Some innovative models combine insurance with bonds (sometimes called resilience bonds, as described above) where bond coupons are reduced if resilience targets are met or if losses are avoided. In essence, insurance mechanisms can backstop adaptation finance, ensuring that a drought, flood or cyclone doesn't derail the financial viability of a project.

In applying blended finance, it's important to align with country systems whenever possible. That means structuring these instruments in ways that complement national public financial management — for example, integrating climate funds into the national treasury or budgeting framework so that external finance is co-ordinated with domestic resources. Ultimately, blended models for adaptation finance should aim to leverage limited public funds to catalyse larger flows of private capital, while safeguarding projects through risk-sharing tools. This approach acknowledges the reality that without public intervention, many high-priority adaptation investments (for example coastal defences or climate-smart agriculture for smallholders) might not attract sufficient financing due to lower commercial returns.

# POOLED FUNDS AND PROGRAMMATIC BUDGETING

Many effective CPs use pooled financing mechanisms — such as multi-donor trust funds, basket funds or other centralised funding vehicles — to unify various sources of finance under one co-ordinated programme. Establishing a national climate fund or a ‘family of funds’ allows countries to aggregate funding from government budgets, bilateral donors, multilateral climate funds, and even private or philanthropic contributors, and then allocate these resources in alignment with a common strategy and results framework. Pooled funds reduce fragmentation by channelling money through one system, simplifying management and enabling programmatic budgeting (that is, managing funds by programme themes or outcomes rather than disconnected projects).

For example, Vanuatu’s CP has created a co-ordinated family of climate funds that serve as a central hub for finance. This includes a climate fund housed in the Ministry of Finance, a National Green Energy Fund, a disaster emergency fund, a new national L&D fund, and an environment trust fund. Together, these funds cover different niches but are centrally co-ordinated under government systems. All climate finance sources — bilateral aid, GCF grants, UN agency support, World Bank loans and so on — flow through the Vanuatu Treasury and are tagged against NDC targets. By requiring that external partners channel funds through the national system, Vanuatu ensures that investments are transparently recorded in the budget and aligned with its climate priorities (each NDC target in Vanuatu’s plan specifies not just the funding needed but also potential funding sources, guiding donors to where they can contribute). This pooled approach has strengthened country

ownership and reduced the duplication and transaction costs associated when donors each run separate projects.

When setting up a pooled fund or trust fund for a CP, several design considerations are vital:

## Governance arrangements

- Establish clear governance structures, typically a steering committee or board that approves allocations, with representation from core ministries (for example finance, environment) and, where appropriate, donors or stakeholders.
- Define decision-making rules, ensuring alignment with national strategies. Some countries link fund disbursements to results frameworks or require multi-stakeholder consensus for project approval.
- Balance country ownership with donor fiduciary standards. Many funds adopt a two-tier system: a high-level board for strategic guidance and a technical committee for project screening.
- Decide access modalities: direct access by national institutions (ministries, NGOs, private sector) builds capacity and ownership, whereas intermediated access may help meet donor requirements.

# THREE REALISTIC FINANCE INTERFACE MODELS

Recognising that countries are at different stages of institutional development and functionality of CPs, rather than leaning on to a single architecture, this module offers three realistic models for how a CP can interface with finance.

Based on the four functions — track, align, negotiate and channel — discussed above, here we look into three models. It should be noted that these are not a progression — Model A is not ‘inferior’ or ‘early stage’ compared to Model C. The right model is highly context- and country-specific.

Aspects	Model A: co-ordination-only CP	Model B: hybrid CP	Model C: treasury/national system- anchored CP
<b>CP functions active</b>	Track, align, negotiate	Track, align, negotiate, selective channel	Track, align, negotiate and full channel function
<b>Finance flows</b>	No, supports finance flows through existing channels	Partially — selected windows (eg programme baskets, national fund windows), but large share remains outside CP	Yes — most finance is routed through national treasury/fund
<b>Governance requirement</b>	Co-ordination capacity and secretariat	Dedicated unit for fund management	Strong PFM systems, full national audit and reporting
<b>Key risks</b>	<ul style="list-style-type: none"> <li>● <b>Limited leverage on finance decisions</b> — without pooled funds, the CP may not influence how partners allocate finance and sequencing.</li> <li>● <b>Persistent fragmentation</b> — finance continues being disbursed through existing mechanisms, which could dilute strategic coherence.</li> <li>● <b>Dependence on partner alignment</b> — co-ordination relies on partner goodwill and shared priorities.</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Institutional complexity</b> — running both co-ordination and limited channelling functions increases governance and fiduciary complexity.</li> <li>● <b>Partial fragmentation persists</b> — even with windows, external flows may continue outside CP purview, requiring ongoing alignment.</li> <li>● <b>Unclear incentives</b> — partners may be uncertain about when to engage via the CP versus established channels.</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Large public finance requirements</b> — needs robust PFM, audit and transparency systems. Weak systems can block efficient disbursement and erode trust.</li> <li>● <b>Risk of centralisation</b> — treasury dominance may crowd out subnational, civil society or private input without safeguards.</li> <li>● <b>Fiscal pressures</b> — climate funds integrated into national budgets may compete with other fiscal priorities.</li> </ul>
<b>Examples</b>	<p><b>Climate finance units (eg Mozambique, Uganda, Belize) as co-ordination hubs</b></p> <p>In several developing countries, <b>climate finance units (CFUs)</b> established within finance or planning ministries serve as focal points for co-ordinating climate finance across domestic and international sources. These units align finance with national planning (such as NDCs and NAPs), support project pipeline development and improve transparency of inflows, but they typically do not manage or channel pooled funds themselves. Instead, they co-ordinate between ministries, partners and financiers to integrate climate finance into budgeting and planning systems.</p>	<p><b>Bangladesh Climate Funds</b></p> <p>Bangladesh has both a national government-funded climate change trust fund (BCCTF) and the multi-donor Bangladesh Climate Change Resilience Fund (BCCRF). The BCCTF is on-budget with national oversight, while the BCCRF pools donor funds for climate work; these create both alignment and selected pooled finance windows.</p>	<p><b>Seychelles innovative sovereign instruments</b></p> <p>This debt-for-nature swap and sovereign ‘blue bond’ aimed at financing marine conservation and climate adaptation illustrate how a country can anchor climate investment in national financial systems with oversight and strategic linkage to national plans.</p>

Choosing a model entirely depends on the country's context and capacity. For example, Model A requires a higher degree of co-ordination capacity while Model C requires stronger public finance management (PFM) systems including strong audit capacity and transparent frameworks at national level.

## THE ROLE OF NATIONAL INSTITUTIONS AND THE PRIVATE SECTOR

A robust CP finance strategy leverages national institutions — especially NDBs and other domestic financial institutions — and actively engages the private sector. These actors are crucial for scaling finance and ensuring sustainability, but they are sometimes underutilised in climate finance initiatives. **Module 3** emphasises bringing these players into the platform's financing architecture from the start.

### National development banks and climate funds

NDBs (and analogous national climate funds or green banks) can serve as financial intermediaries for a CP. They are positioned to blend international funds with domestic resources and to on-lend or invest in local currency, which mitigates foreign exchange risk for projects. In many cases, NDBs bridge the gap between public and private finance — they understand local market conditions and can structure deals that international investors might shy away from. The Sevilla workshop identified the early engagement of NDBs as *crucial*, noting that NDBs often have available capital or can raise capital, but they lack project pipelines and are not well integrated into platform design. Too often, NDBs have been treated as an afterthought, leading to missed opportunities to channel funds through existing national banks. A key lesson is to involve NDBs from the outset of a CP: include them in planning and governance, build their capacity for climate project appraisal, and possibly use them as the fiduciary entity managing a blended finance vehicle.

For example, Rwanda's green fund (FONERWA) began as a government-run climate fund but has evolved toward a platform approach — it rationalises climate finance flows to government agencies, the private sector and NGOs using both domestic and international resources. Over time, FONERWA has moved from financing individual

projects to funding programmatic portfolios, and has opened windows to engage the private sector through blended financing instruments. This includes offering concessional loans and grants to catalyse private investment in green projects. Similarly, other countries are exploring how their NDBs can manage dedicated climate finance lines (for example a national bank running a credit line for resilient SMEs, backed by a mix of donor funds and its own capital). By empowering national institutions as financiers, CPs build in-country financial ownership and expertise that will last beyond donor project cycles.

### Private sector engagement

Mobilising private sector investment is a cornerstone of sustainable climate finance, given that public funds alone cannot meet the huge adaptation financing gap. CPs should incorporate strategies to 'crowd in' private investment by addressing the barriers that keep private capital on the sidelines. The biggest barrier, as noted, is the lack of direct returns in many adaptation activities — many resilience benefits don't translate into cash flows for investors. Therefore, platforms must use instruments that alter the risk-return equation for the private sector. This can include:

- **Public-private partnerships (PPPs).** Government or donors share upfront costs or provide risk guarantees, while private partners bring efficiency and innovation. For example, a climate-resilient infrastructure project (for example a flood-defence system with revenue potential) with government underwriting certain risks, such as minimum revenue guarantees or availability payments.

- Credit guarantee facilities and risk-sharing.** Setting up a guarantee fund that covers a portion of losses for banks that lend to adaptation projects (such as loans to farmers for climate-smart irrigation, or to SMEs for resilience technologies). This encourages domestic banks to extend credit to new sectors. As mentioned, layering first-loss capital from public sources is one way to implement this. By de-risking loans, the cost of capital for adaptation can drop to affordable levels.
- Co-financing and matchmaking.** Encouraging domestic companies and investors to co-finance projects alongside public funds, using tools like matching grants or investor forums. A CP can maintain a ‘deal book’ or database of vetted projects to connect pipeline projects with potential financiers, improving information flow and generating bankable opportunities.
- Leveraging domestic financial institutions.** Beyond NDBs, engaging commercial banks, microfinance institutions and insurers. For example, local banks can offer special lending products supported by interest rate subsidies or guarantees, and insurers can provide climate risk coverage to make clients more creditworthy. Including chambers of commerce or industry associations in governance or working groups ensures the private sector voice and co-investment opportunities are captured.

In practice, successful private sector engagement often comes down to addressing risk perceptions. From the global perspective, only a very small fraction of adaptation finance currently comes from private sources (around 2–5% by various estimates), so innovative approaches are needed to change business-as-usual. One insight from practitioners is that matchmaking and mapping of finance should happen at the national level to connect priority projects with potential investors. This module stresses early dialogue with private sector stakeholders: some CPs convene public–private roundtables or assign a ‘private sector liaison’ in the platform’s secretariat to proactively bring in private partners.

Minister checking LIFE-AR investment in Burkina Faso.  
Credit: LIFE-AR Burkina Faso





As a practical example, consider Madagascar's emerging CP for climate finance, which showcases creativity in financing architecture. Madagascar is a low-income, climate-vulnerable country, yet it is structuring deals to attract diverse investors by linking climate goals with financial returns. Key features of Madagascar's approach include a thematic resilience bond (the 'lemur bond') and a combined use of pooled funds from international partners, illustrating how a CP can simultaneously tap capital markets and concessional sources.

### ***'Lemur bond' – an outcome-based resilience bond***

Madagascar, with support from the World Bank and the GEF, is developing an innovative bond nicknamed the lemur bond to raise funds for biodiversity conservation and climate resilience. This bond is structured as an outcome payment bond: essentially, investors provide upfront capital for conservation/adaptation projects, and returns are linked to the achievement of certain resilience or ecological outcomes. The concept emerged from collaboration with international finance institutions and is part of Madagascar's broader climate finance mobilisation strategy announced at COP29.

Madagascar issued its first sustainability bond in 2024 to local investors (a US\$38 million bond for ecological and social projects) with backing from development finance institutions including the International Finance Corporation (IFC), Dutch Entrepreneurial Development Bank (FMO) and Proparco/French Development Agency (AFD).

The lemur bond follows on from this and aims to leverage capital markets for adaptation by offering investors a product tied to positive environmental outcomes. To make such a bond viable, MDBs are considering providing guarantees or credit enhancements — for example, the World Bank and GEF are exploring guarantees so that private investors will be repaid even if certain outcomes aren't fully met. This significantly reduces risk and makes the bond attractive despite the novel focus on resilience (a theme traditionally harder to monetise than, say, renewable energy). If successful, the lemur bond would channel private investment into Madagascar's forests, ecosystems and adaptation needs, effectively turning global investor interest in ESG into finance for on-the-ground resilience.

### ***Pooled international support – blending IMF, MDB and donor funds***

In parallel with market instruments, Madagascar is pooling funds from international financial institutions and donors under its CP. Notably, Madagascar became the first pilot country for the IMF–World Bank Enhanced Cooperation Framework on climate action, and in 2024 the IMF approved a US\$321 million RSF arrangement for Madagascar. The RSF is a concessional programme aimed at policy reforms for climate resilience (for example strengthening public financial management for climate and improving disaster preparedness) and provides long-term low-interest financing that bolsters the country's fiscal space for climate investments. Alongside this, the African Development Bank (AfDB) has channelled support through its Climate Action Window, and the GEF has committed significant grant resources: roughly US\$50 million from the GEF Trust Fund and Least Developed Countries Fund is being programmed for Madagascar to fund projects that blend climate, biodiversity and livelihood objectives. Rather than handling each of these funds in isolation, Madagascar's platform approach seeks to coordinate them within a unified framework — for example, aligning the use of IMF RSF funds with the pipeline of projects that GEF grants will support, and ensuring AfDB's support complements World Bank investments.

There is talk of establishing a central climate finance unit or fund in-country to oversee this 'basket' of funds (including the government's own contributions). By aggregating money from multilateral lenders (IMF, World Bank, AfDB) and donors (GEF and bilaterals), Madagascar hopes to direct all streams toward priority programmes identified in its NDC and NAP. This blended architecture increases the predictability and scale of finance: for example, RSF funds can provide foundational budget support for climate policies, while GEF grants can be used for grant elements in projects (community grants, technical assistance), and the lemur bond (when issued) will bring in private capital for specific outcomes. All are co-ordinated under the CP so that they complement one another rather than duplicate or work at cross purposes.

## Early challenges and safeguards

Implementing such an ambitious financial architecture is not without challenges. One concern is debt sustainability — taking on bonds and loans for climate action must be managed carefully in a vulnerable economy. This was recognised at the Sevilla workshop, which stressed that new climate finance instruments for LDCs/SIDS must *address debt sustainability* and not overly burden countries. Indeed, small states often have limited fiscal space and high debt-to-GDP ratios, so any bond issuance (like the lemur bond) needs to be sized and structured prudently.

In Madagascar's case, the IMF's involvement via the RSF provides some reassurance: the RSF programme is designed with an eye on maintaining debt sustainability, and it unlocks policy reforms that could improve economic resilience. Additionally, regulatory hurdles such as setting up the legal framework for outcome bonds, and establishing robust monitoring to measure the 'outcomes' for bond payouts, are being navigated.

The Madagascar example has highlighted the importance of strong institutional capacity — the country is receiving technical assistance (for example from the IFC on sustainable finance taxonomy) to ensure it can monitor results and meet reporting standards for these new instruments. Transparency and governance will be key to maintaining investor and donor confidence: the platform will likely institute joint oversight involving the Ministry of Finance and development partners to supervise how funds (from the bond or pooled donors) are used. Early lessons from Madagascar point to the need for *innovative thinking combined with solid fundamentals* — the innovation (lemur bond, blended pools) must rest on sound public finance management and clear rules, otherwise it could falter. The case nonetheless is inspiring other countries by demonstrating that even a highly vulnerable country can access capital markets for adaptation, when supported by guarantees and anchored in a comprehensive national platform.

In sum, the Madagascar case study exemplifies a hybrid financing architecture under a CP: one that merges cutting-edge market instruments (a themed resilience bond) with orchestrated public finance (IMF, GEF and AfDB contributions), all aimed at the same national resilience goals. This blended approach to resilience finance is at the frontier of climate finance innovation. Madagascar's experience will serve as a learning example for other LDCs on mobilising diverse funding at scale through a country-owned framework.

# 5 PIPELINE DEVELOPMENT AND INVESTMENT PLANNING

*DEVELOPING BANKABLE  
PROJECTS AND INVESTMENT  
PLANS ALIGNING WITH  
NATIONAL NEEDS*





## Workbook | Module 5

In the Country Platform Action Toolkit Workbook, there are practical exercises to help you apply the knowledge gained from this module.

**Worksheet 5.1:** project readiness assessment grid (PRAG)

**Worksheet 5.2:** pipeline prioritisation rubric (PPR)

**Worksheet 5.3:** environmental, social and governance screening and compliance checklist

**Module purpose:** this module focuses on building robust project pipelines and investment plans under the CP, converting strategies into concrete, bankable projects and programmes. It aims to strengthen country capacity in preparing, prioritising and delivering a pipeline of climate-resilient investments that are aligned with national plans and attractive to funders.

# WHAT CAN THE COUNTRY PLATFORM CO-ORDINATE? PLANS, PORTFOLIO AND PIPELINE

The CP can play a strong role as a mechanism that governs co-ordination, learning and partner alignment around plans, portfolios and pipelines that exist or are being developed. Understanding the distinction between these levels is essential in designing and ensuring an effective role for the CP.

The CP could play a role in well-co-ordinated planning – relating to NDC and NAP development – through co-ordination between different sectoral ministries and stakeholders, governing portfolio selection, supporting project preparation and alignment with partners and stakeholders, and facilitating learning. The CP's value is in ensuring alignment, reducing fragmentation and creating conditions for plans, portfolios and pipelines to function well.



### Plans

Relate to a country's priorities and targets as set out in the NAP and NDC, often with indicative costing. The NDCs and NAPs set out direction and political commitments.



### Portfolios/ investment plans

Relate to selected programmes and interventions responding to the targets set out in the NDC/NAP.



### Pipelines

Relate to the sequenced sets of projects/ programmes within the portfolio that are sufficiently prepared to be financed and implemented.



## LINKING TO NATIONAL PLANS AND BUDGETS

Climate investment pipelines should flow directly from national climate and development plans. Projects must be mapped to NDCs, NAPs or sectoral strategies and integrated with public investment tools such as MTEFs and annual budgets. For example, São Tomé and Príncipe's NDC investment plan costed each target and identified responsible agencies, making commitments actionable. Furthermore, aligning climate pipelines with INFFs ensures projects fit within broader development finance strategies. For example, Nigeria's NDC investment plan links targets to budgetary needs across five sectors, sequencing and phasing investments programmatically rather than compiling unfunded wish lists.

Crucially, the pipeline should feed into government budgeting and public investment systems. This means that high-priority climate projects are submitted through the normal public investment appraisal process and

considered in sectoral budget allocations. Tying project selection to the budget cycle increases the likelihood that domestic resources (or budget support from partners) can co-finance the initiatives. By integrating with national systems in this way, climate projects reinforce development plans (rather than sit outside them) and can be monitored through government processes, enhancing ownership. As one report puts it, external climate finance is best absorbed when assistance is aligned and harmonised to national priorities and systems. Countries like Vanuatu have even required that climate projects align to their national sustainable development plan pillars, thereby ensuring donors fund country-defined priorities.



## PROJECT PREPARATION FACILITIES AND FEASIBILITY SUPPORT

A common bottleneck in many developing countries — especially LDCs and SIDS — is the gap between climate project concepts and 'bankable' projects. Many have insufficient project preparation support, resulting in a pipeline gap where good ideas do not mature into fundable proposals. Public and private investors often cite the lack of a significant pipeline of well-prepared, well-structured projects in emerging markets as a key barrier to scaling investment. In fact, the *infrastructure financing gap* is compounded by a serious gap in financing for project preparation. While project preparation facilities (PPFs) exist, they often operate below their potential due to narrow scope and limited flexibility. These challenges are magnified in LDCs and SIDS. In short, many governments lack the capacity and knowledge to convert project proposals into economically attractive investment opportunities. PPFs have thus emerged as critical tools, with public institutions (multilateral development banks, climate funds and so on) offering preparation support to help projects reach an investment-ready stage.

The pipeline should be sized to match available delivery capacity and realistic finance — not to maximum ambition. A CP can play a critical role in ensuring that the pipelines are paced and set in a realistic manner. Pipeline pacing must account for the implementation and absorption capacity. Rather than focusing on having a long list of pipelines, it is crucial to have a small number of well-prepared, finance-ready and high-impact pipeline investments.

This section provides guidance on taking projects from concept to bankability. It outlines how a CP can establish or leverage PPFs and technical assistance for feasibility studies, environmental and social impact assessments, engineering designs, and financial modelling. For instance, a platform may set up an in-house project preparation facility or partner with existing ones such as the GCF's PPF service or regional development bank facilities. The GCF's PPF, for example, deploys expert firms to work with accredited entities on project development, helping to refine project designs and prepare funding proposals. Similarly, MDBs often have project preparation support

windows, which governments can tap into, for example the Global Infrastructure Facility (GIF). These facilities can fund pre-feasibility and feasibility studies, transaction advisors for PPPs, and other early-stage needs.

It's important that CPs emphasise quality over quantity in pipeline development. Rather than submitting dozens of incomplete concept notes to every donor, the focus should be on prioritising a set of well-developed proposals ready for investment. To manage this, some platforms form a pipeline sub-committee or task force under the governance structure to oversee project preparation progress. Such a body can regularly review the status of pipeline projects (for example at concept, pre-feasibility, feasibility completed, structuring stage and so on) using a readiness scoring tool. Indeed, using a standardised project readiness assessment grid can help classify projects by their stage of development and support needs. For example, the GIF's Project Readiness Assessment (PRA) tool scores projects on key preparation components — technical design, commercial/financial structure, affordability, regulatory approvals and environmental/social safeguards — to identify gaps and recommended actions. CPs can adopt a similar assessment tool to decide which projects need additional preparation support or expert assistance. **Worksheet 5.1 in the workbook** provides a template readiness assessment grid, with criteria such as:

- Existence of a concept note or prefeasibility study
- Identification of project sponsor/champion
- Stakeholder consultations done
- Financial model completed, and
- Environmental and social risks assessed.

Projects that score highly on readiness can be fast-tracked to matchmaking with funders, whereas those with low scores can be targeted for PPF support.

Lastly, this section encourages countries to secure transaction advisory services for complex projects (for example structuring a PPP for a resilience infrastructure, or designing a blended finance fund for renewables). Where in-country expertise is lacking, platforms should facilitate partnerships with transaction advisors — whether via development bank facilities, donor programmes, or the private sector — to ensure projects are structured in a bankable manner. The platform's co-ordination role can be to connect project owners (for example line ministries, municipalities or private developers) with these support resources and to monitor progress. By the end of this module, participants should understand how to systematically move projects through the pipeline stages: from an initial idea aligned to national plans, into a fully formulated, bankable project with a compelling business case and finance-ready documentation.



## PRIORITISATION AND SCREENING OF PROJECTS

With a pipeline of potential projects in hand, countries need methods to evaluate and rank these projects objectively. This section introduces prioritisation frameworks that CPs can use to transparently select the most impactful and feasible projects for support. Typically, this involves developing a set of criteria and a scoring rubric — often through a multi-stakeholder process — and applying it to project proposals. Common criteria include:

- Climate impact (mitigation potential or resilience benefits)
- Economic return or cost-effectiveness
- Social inclusion (for example does the project benefit vulnerable groups, create jobs or address gender gaps?)

- Alignment with national policies (NDC/NAP targets, sector plans)
- Technical and financial feasibility (readiness, capacity to implement, availability of co-financing), and
- Environmental and social safeguards (minimal negative impacts, or co-benefits for ESG goals).

Criteria can be weighted to reflect national priorities. For example, a country focused on employment may give more weight to job creation, while another may prioritise greenhouse gas reductions per dollar. A simple scoring rubric (for example 1–5 per criterion) generates an overall project score, allowing projects to be ranked objectively. Transparent scoring builds consensus and reduces politicisation.

## ESG Screening

Incorporating ESG standards early — for instance, checking that projects meet environmental safeguards, respect social and gender inclusion, and have good governance structures — can greatly improve project bankability. Many climate financiers (green bonds, climate funds, development banks) now require robust ESG due diligence. Ensuring pipeline projects already align with recognised sustainability benchmarks (such as IFC Performance Standards or a national green taxonomy) will boost investor confidence. In practice, applying ESG filters ensures projects meet sustainability benchmarks and are seen as lower risk and more attractive to investors. Investors increasingly believe that ventures with strong ESG performance are *less risky and better positioned for the long term*. For example, Colombia's NDB, FINDETER, screens projects for environmental and social risk as part of its green finance strategy and only finances those meeting its Green Protocol criteria (a voluntary sustainable finance guideline). By doing so, it not only safeguards outcomes but also opens the door to international green investors who demand high ESG standards.

## Linking to budgets and phasing

Further criteria for prioritisation are timing and budget linkage. Once top-priority projects are identified, countries should link them to their budgeting and financing strategy — for example by including them in the public investment programme or multiyear budget framework. This creates a pipeline that is not just a list of projects, but a sequenced investment plan. High-priority, 'ready' projects might be slated for the upcoming budget year or donor funding cycle, whereas lower-priority or longer-term projects are scheduled in later years, giving time for further preparation. This phasing avoids overloading agencies with too many projects at once and aligns with realistic absorption capacity. It also signals to development partners which projects are government-endorsed and when support is needed, improving co-ordination.



To illustrate these concepts, we examine two contrasting country approaches to pipeline development: Colombia and Vanuatu.

## Colombia's green investment approach

Colombia is establishing a *climate finance platform* (often referred to as a 'green investment platform') that leverages the capacities of an NDB alongside government planners. In this model, a finance institution such as Bancóldex or FINDETER works with the National Planning Department (DNP) and sector ministries to identify and curate a pipeline of green projects. Colombia recognised early on that a major hurdle was not a lack of climate policy ideas, but a lack of investor-ready projects. To tackle this, the DNP launched a 'Climate Finance Broker Facility': essentially a matchmaking platform linking high-potential climate projects with investors. A digital project registry was created where project proponents submit standardised information (using the project checklist tool described previously), and the platform applies screening criteria including alignment with NDC targets and ESG safeguards. Projects that pass this screening are then supported through preparation stages and presented to potential financiers.

Early results are promising: in one year, Colombia's platform screened over 100 project submissions and selected dozens to present at climate investment forums, resulting in numerous investor meetings and expressions of interest. A key to Colombia's approach is the involvement of its NDBs in pipeline management. These banks bring financing expertise and are integrating climate criteria into their lending. For example, both Bancóldex and FINDETER have adopted a green protocol, committing to support low-carbon, resilient investments and apply environmental risk management to projects. In the platform, projects are vetted against sustainability criteria (such as emissions reduced per dollar, social inclusion and alignment with Colombia's Green Taxonomy) before they are deemed 'bankable.' According to Colombia's DNP, this process

*"streamlines project preparation and increases visibility, making it easier for investors to identify viable opportunities";* which in turn strengthens Colombia's climate finance ecosystem. An important innovation is the use of a digital tracking system: every pipeline project is tracked in an online dashboard showing its status (for example concept complete, feasibility done, funding secured) and the finance mobilised. This transparency builds trust with both domestic stakeholders and international partners. Colombia's case demonstrates a high-capacity, finance-driven pipeline model where robust institutions (DNP and NDBs) drive the process, apply rigorous filters and actively broker deals. It underlines the value of using a financial intermediary to manage the pipeline, with a clear focus on bankability and investor requirements.

Launch of Colombia's country platform, November, 2025. Credit: Nicolas Steven Escobar Forero, Ministry of Finance, Colombia



<sup>v</sup> NDC Partnership (2025) How Six Countries are Mobilizing Finance for NDC-Aligned Projects. <https://ndcpartnership.org/news/how-six-countries-are-mobilizing-finance-ndc-aligned-projects>



## Vanuatu's NDC investment pipeline

Vanuatu offers a different context — a SIDS with limited institutional capacity but strong country ownership of climate agendas. Vanuatu has established a climate finance CP anchored in its existing advisory board, the NAB. The NAB, which includes representatives from government ministries, donors and civil society, serves as the central co-ordination body for all climate projects. Vanuatu's approach mandates that all proposed climate finance projects (whether from government agencies or external partners) must be submitted through the NAB for approval. In effect, development partners and donors are requested to channel their climate project proposals via this single window. The NAB, through its Climate Finance Working Group, vets each proposal for alignment with Vanuatu's NDC targets and its national climate change policy. Only projects that support the country's priorities are endorsed. This has resulted in a co-ordinated pipeline where every project is mapped to Vanuatu's climate strategy. In fact, Vanuatu's enhanced NDC (2025–2035) goes as far as linking each of its 219 targets with specific financing sources or instruments, providing clear guidance to funders. For example, if a target is to increase community rainwater harvesting by X%, the NDC investment plan identifies that grant funding from the AF or GCF is the preferred source, supplemented by domestic budget where possible. By explicitly identifying the finance modality for each target, Vanuatu sends a strong signal to donors about where their contributions are needed and avoids duplication.

Another hallmark of Vanuatu's platform is integrating climate finance into national public finance systems for transparency. All climate funds flow through the government's treasury and budget process wherever feasible, rather than off-budget. This ensures funds are tracked and aligned with the country's development budget. It also enables Vanuatu to report comprehensively on climate finance inflows. The NAB, being government-led, has improved donor co-ordination significantly — for example, major donors now consult the NAB's pipeline before pledging support, to ensure their projects fit the plan. While Vanuatu's institutional capacity is modest, this central co-ordination has increased transparency and alignment, reducing fragmented donor-driven projects. An analysis noted that such alignment to national systems is crucial for sustainability, and in Vanuatu's case, even development partners like the EU have provided budget support for climate initiatives to be executed through government systems. The lesson from Vanuatu is that strong country ownership and clear rules of engagement (requiring alignment with the NDC and routing through a central platform) can yield a well-aligned pipeline even in a low-capacity context. It demonstrates that CPs are not only for large emerging economies; even small states can institutionalise climate investment planning and assert control over how climate finance is programmed.

*These two cases provide rich insights into institutional models:* Colombia's model shows the advantage of leveraging an NDB and technical expertise to proactively develop projects and attract private investment. Vanuatu's model shows that with political will and co-ordination, a country can ensure all climate finance supports a single strategy, enhancing effectiveness and accountability. Both underscore the importance of linking pipelines to policy (through NDCs) and using a structured process to manage the pipeline.



# 6. LEARNING, MONITORING AND SCALING

*ADAPTATION, CONTINUOUS  
IMPROVEMENT AND  
SUSTAINABILITY*



## Workbook | Module 6

In the Country Platform Action Toolkit Workbook, there are practical exercises to help you apply the knowledge gained from this module.

**Worksheet 6.1:** platform monitoring, learning and evaluation framework template

**Worksheet 6.2:** adaptive management reflection tool

**Worksheet 6.3:** sustainability and scale strategy canvas

**Module purpose:** this final module underscores that a CP is not a one-off project but an evolving, adaptive process meant to transform how climate finance is delivered over the long term. Effective CPs create systems for continuous learning and improvement, ensuring that adaptation efforts remain responsive and sustainable. This module focuses on building robust MEL frameworks, fostering ongoing peer exchanges, and planning for scaling up and institutionalising successful approaches for lasting impact. Below, we explore these key components: MEL frameworks, South–South knowledge exchange, scaling and sustainability strategies, an illustrative case (LIFE-AR), and practical tools and resources.

## MONITORING, EVALUATION AND LEARNING FRAMEWORKS

A strong MEL framework is essential for adaptive management of a CP. Where traditional project M&E focused on short-term outputs, CP MEL systems emphasise *long-term resilience outcomes and systemic change*. In fact, experts stress that MEL for CPs should prioritise scalability, sustainability and systems change rather than narrow indicators. Key elements of a robust CP MEL framework include:

- **Clear metrics and indicators.** Define indicators tied to climate resilience outcomes, inclusivity (for example gender or Indigenous participation) and finance leveraged, aligned with national adaptation goals. The focus should be on measuring transformative impact (for example strengthened local resilience, policy shifts) over time, not just immediate project deliverables.
- **Data collection and real-time tracking.** Establish processes to collect data at national and local levels and to track climate finance flows and results in real time. For example, some countries use climate budget tagging (to track climate-related expenditures across the national budget) and adaptation impact dashboards to monitor progress on resilience initiatives. These tools provide transparency and enable course correction by showing where money is flowing and what outcomes are being achieved.

- **Feedback loops for learning.** MEL should feed back into decision making through regular learning cycles. Rather than a one-way reporting exercise, MEL acts as a *governance function* of the platform, ensuring accountability and continuous improvement. This means setting up regular reviews (for example quarterly or annual learning workshops) where data and community feedback are discussed and strategies are adjusted accordingly.
- **Participatory monitoring.** Involve communities and local stakeholders in MEL. A participatory MEL approach (for instance, training community groups to collect data or report on project performance) enhances accountability and local buy-in. It also ensures that qualitative insights — such as whether interventions are truly meeting local needs — inform platform decisions. Such inclusive MEL aligns with the principle that those affected by adaptation efforts should help assess their effectiveness.
- **Alignment with national systems.** Design the platform's MEL to integrate with national planning and reporting systems (for example linking with the country's Sustainable Development Goal (SDG) or NDC monitoring frameworks). This avoids creating parallel bureaucracies and helps institutionalise the platform's learning process. By embedding MEL indicators into national development monitoring, CP results contribute to and draw from existing government data systems.

A real-world example underscores these principles: Uganda's LIFE-AR platform has built *real-time MEL systems* that track financial flows down to the local level and measure resilience outcomes, providing actionable feedback to adjust strategies. This adaptive approach has enabled LIFE-AR to refine its activities based on what the data shows is working on the ground. We will explore this case further below, but the takeaway is clear — a well-designed MEL system can turn a CP into a *learning engine* that drives continuous improvement.

## CONTINUOUS LEARNING AND SOUTH–SOUTH KNOWLEDGE EXCHANGE

Continuous learning is greatly enhanced when countries share knowledge and learn from each other. Many LDCs and SIDS are pioneering CPs simultaneously, creating a prime opportunity for South–South (and South–North) knowledge exchange. Peer learning networks help avoid reinventing the wheel and enable adaptation of successful practices across different contexts. South–South collaboration and evidence sharing is *essential to improving CPs* through real-time learning and feedback. Key strategies to build a culture of continuous learning include:

- **Peer exchange networks.** Formalise networks or communities of practice for teams working on CPs. Regular webinars or virtual forums can connect practitioners from different countries to discuss challenges, share breakthroughs and even troubleshoot issues in real time. Such *peer-to-peer exchanges* create feedback loops that strengthen platform effectiveness through shared learning on MEL approaches and other innovations.
- **Twinning and mentorship.** Pair up countries or platform teams for direct exchange visits or mentorship arrangements. For example, a new CP initiative could be 'twinned' with an established one (perhaps pairing an African LDC with a Pacific SIDS) so that each can learn firsthand from the other's experiences in setup, governance and finance mobilisation.
- **Capture successes and failures.** Encourage honest sharing of what's working and what isn't. Countries should document not only their success stories but also the approaches that have underperformed, and why. The importance of sharing *failures alongside successes* was highlighted as a valuable learning approach — it allows others to avoid the same pitfalls and fosters a 'fail forward' mentality. A safe learning space (for example closed-door peer meetings) can help facilitate frank discussions about challenges.

- **Leverage existing global networks.** Rather than create new forums from scratch, countries can use platforms offered by existing climate finance networks. Forums such as the Climate and Development Ministerial meetings, the V20 Group, the NDC Partnership, and the Coalition of Finance Ministers for Climate Action can serve as venues to exchange CP experiences and advocate for support. For instance, LDC/SIDS governments could request a dedicated session on CPs at these forums or set up a working group through the NDC Partnership to focus on platform implementation learnings. These networks also help amplify common needs (like calls for simpler fund access) with a collective voice.
- **CP learning hub or annual summit.** Building on workshop recommendations, this toolkit suggests establishing a central 'CP Learning Hub' — potentially an online repository and forum for resources, case studies and discussion. Additionally, an annual gathering of CP teams (either standalone or attached to an event like COP) could be instituted for in-depth knowledge exchange and relationship-building among peers. Such a recurring convention would institutionalise the sharing of updates, tools and new evidence each year, continuously knitting together a community of practice.

By investing in these knowledge exchanges, countries reinforce that a CP is a learning journey, not a static model. It's crucial to approach platforms *diagnostically* — testing and adjusting approaches through learning, rather than assuming a preset formula. A strong peer network accelerates this adaptive learning across nations.

## SCALING AND LONG-TERM SUSTAINABILITY STRATEGIES

Designing a CP with the long game in mind is vital for true impact. Scaling up successful approaches and ensuring sustainability beyond individual projects or political administrations will determine whether a platform endures as a transformative mechanism. This section provides guidance on how to institutionalise and expand CPs:

- **Integrate into policy and law.** Anchoring the platform in legislation or formal policy secures longevity. For example, platforms can be established under a climate change act, finance law or executive decree, with formal roles for co-ordination units within ministries or inter-ministerial committees. Bangladesh's Climate and Development Partnership, chaired by the Ministry of Finance, integrates with national climate governance structures to ensure legal backing.
- **Secure long-term financing.** Sustainable platforms require reliable core funding. Options include dedicated budget lines, small levies on climate projects or basket funds/endowments shared across government and donors. Uganda's LIFE-AR, for instance, is exploring a basket fund model to maintain ongoing co-ordination and local delivery mechanisms.
- **Diversifying funding** — government revenue, climate funds, MDB support and private sector contributions — reduces dependence on single donors.
- **Planned pathways for scale-up.** Platforms should have a phased strategy to expand geographically, thematically or financially. Start with pilot sectors or regions, then gradually co-ordinate larger grants, blended finance or private investments. Replication across other countries, as LIFE-AR has done with front-runner LDCs, amplifies impact. Documenting lessons and models facilitates wider adoption.
- **Align with international climate finance reforms.** Mature platforms can leverage success to improve access to international funds, including direct accreditation to the GCF. Engaging MDBs and bilateral donors ensures programme alignment behind the platform. Platforms can also influence global climate finance reforms by showcasing their results in forums like the COP, G20 or Climate and Development Ministerial, advocating for harmonised, country-led financing approaches.

- **Maintain flexibility and local ownership.**

Sustainability depends on trust, relevance and adaptability. Platforms should retain participatory governance, involving civil society and the private sector, while remaining flexible to changing contexts. Adaptive management allows platforms to evolve, ensuring they become part of the country's institutional DNA for climate action.

Pro tip: as you plan for scaling, also plan for communication. Maintaining donor and political support during scale-up can be challenging — often funders want to see quick wins. By communicating early successes and evidence (via the MEL system) to stakeholders, platforms can justify continued and increased support. The experience gained through LIFE-AR shows that demonstrating real results at the community level helps keep donors engaged through the next phase, though expectations must be managed that deep systemic change takes time. Transparent sharing of progress (for example publishing platform dashboards or annual reports) can build confidence among funders and the public, creating a virtuous cycle of support.

LIFE-AR core and MEL teams checking a dairy installation in Ethiopia.  
Credit: LIFE-AR Ethiopia





LIFE-AR provides a rich example of building learning and scaling into a CP's DNA. Launched in Uganda (among other LDCs) as a ten-year programme, LIFE-AR set out not just to deliver adaptation projects but to transform the way adaptation finance is governed, with continuous learning at its core.

### *MEL as a cornerstone*

In Uganda's LIFE-AR platform, a dedicated MEL working group was established early (within the first two years) to design the MEL framework. This working group drew members from across government ministries, civil society organisations and academia — all on a voluntary basis — bringing together diverse expertise (decentralised climate finance, resilience, data management and so on). By involving these stakeholders in co-creating the MEL system, LIFE-AR built broad ownership and capacity for learning. The MEL framework they developed includes robust, real-time monitoring systems that track finance flows to the local level and assess outcomes for communities. For example, the programme can see how much money reaches district authorities and local climate committees, and what resilience-building activities it's funding on the ground. This real-time tracking enables the platform to identify bottlenecks and redirect resources quickly when needed — a feedback mechanism few traditional projects have.

### *Adaptive management in action*

The information gathered through MEL doesn't sit on a shelf — it directly informs action. LIFE-AR instituted regular reflection meetings where data and community feedback are reviewed. As a result, the programme makes iterative adjustments to its approach, essentially 'learning by doing.' For instance, if one district's innovative agriculture initiative yields strong results, that model can be scaled to other districts; conversely, if certain funds are under-utilised at the local level, the platform probes why and modifies its fund allocation or capacity-building efforts. This adaptive management ethos is described well by the programme's practice of capturing lessons and immediately applying them: LIFE-AR's MEL system enables the programme to systematically capture lessons learned from implementation, apply them to improve delivery, and make iterative adjustments based on evidence and community feedback. One concrete outcome has been the reallocation of budget towards more local-level climate planning facilitators, when early monitoring showed communities needed greater support to develop quality project proposals — a change that improved project uptake in subsequent cycles.

### *Integration with national systems*

A critical success factor has been aligning the platform's processes with Uganda's existing government systems. The LIFE-AR MEL framework was deliberately synced with national planning and reporting frameworks — including Uganda's NDP and climate change monitoring tools — to avoid creating a parallel system. This means, for example, that indicators used in LIFE-AR also contribute to Uganda's NDC progress reports, and data collected at local level feeds into the government's central data portals. By doing so, LIFE-AR has not only reduced administrative burden but also helped institutionalise the platform's approach.

Government ministries see LIFE-AR's reporting as part of their own work, which bodes well for sustainability (Uganda's government is considering adopting parts of the LIFE-AR model into its national climate finance strategy under its Climate Change Act). Moreover, government ownership has been reinforced: working group meetings were often hosted by member institutions, fostering a sense that LIFE-AR is *by Uganda, for Uganda* rather than an external project.



## Scaling out and up

The adaptive learning in early implementation set the stage for scaling out. Armed with evidence of what works, Uganda's LIFE-AR is now expanding its '*devolved climate finance*' model to additional districts. Initially piloted in only a handful, the platform will roll out to many more districts over the coming years, decentralising adaptation funds to local governments nationwide. The lessons captured (for example, optimal grant sizes for community projects and effective training modules for local climate committees) are being used to design this expansion. Importantly, the approach is also influencing other LDCs: LIFE-AR's model of locally led, principle-based planning is being replicated by five other front-runner countries in the LDC Group, each adapting it to their context. This cross-pollination is facilitated through LIFE-AR's South-South learning network, where countries regularly share updates. In essence, LIFE-AR is scaling *horizontally* (across districts and across countries) in addition to scaling *vertically* (integrating into national systems).

## Maintaining support

One of the challenges noted by LIFE-AR's implementers has been maintaining donor and political support during the scaling phase. Donor agencies often fund pilot phases, but securing their commitment for long-term scale-up required convincing them that the model delivers results. Here, the real-time MEL data became crucial. By showcasing transparent reports of fund flows and community impact (for example the number of households with improved resilience, hectares of land made climate-resilient and so on), the platform could provide evidence to donors and the Ministry of Finance that continued investment would yield dividends. This reflects a broader truth: funders often seek proof of concept before investing big, so a platform's early learning and transparency directly bolster its scaling prospects. LIFE-AR's experience highlights the importance of 'proving and improving' simultaneously — using early lessons to get better and to gather the political capital needed for expansion. As of 2025, Uganda is looking to embed the LIFE-AR mechanism into its national budgeting process so that a portion of climate finance (including any new international funds it accesses) automatically channels through the platform to the local level, thereby institutionalising the scale-up.



In summary, the LIFE-AR case exemplifies how a CP can be built for adaptation and growth: start small with intensive learning, adjust in real time, align with existing systems, and then expand with strong evidence and stakeholder buy-in. The approach of '*learn early, learn always*' creates a foundation that attracts sustained support and maximises long-term impact.

Inspection of investment sites in Pader, Uganda. Credit: LIFE-AR Uganda

# ADDITIONAL RESOURCES

## Core thinking and evidence on country platforms

- Gul, M, Holland, E, Hassan, A, and Upson, L (2025) The realities of country platforms for LDCs and SIDS: ten key lessons. IIED, London.

<https://www.iied.org/sites/default/files/pdfs/2025-04/22630g.pdf>

- Gilmour, A, Tanaka, J, and Colenbrander, S (2024) Designing and Governing Country Platforms: What Role for the MDBs? ODI, London.

[https://media.odi.org/documents/Designing\\_and\\_governing\\_country\\_platforms.pdf](https://media.odi.org/documents/Designing_and_governing_country_platforms.pdf)

- Climate Capacity Coalition and Finance for Development Lab (2025) Planning and Implementing the Climate and Development Transformation: Country Platforms as Enablers.

<https://www.climatecapacitycoalition.org/en/news/planning-and-implementing-climate-and-development-transformation-country-platforms-enablers>

## Country-led programmatic and adaptation-focused approaches

- NDC Partnership (2026) Country-led programmatic approaches: Scaling adaptation finance in LDCs and SIDS.

<https://ndcpartnership.org/sites/default/files/2026-02/country-led-programmatic-approaches-scaling-adaptation-finance-ldcs-and-sids-center-access-climate.pdf>

- LIFE-AR (n.d.).

<https://www.life-ar.org/en/>

## Integrating urban and subnational dimensions

- CCFLA and SDSN Commission (2025) Integrating Urban and Subnational Priorities into Country Platforms.

<https://citiesclimatefinance.org/publications/integrating-urban-and-subnational-priorities-into-country-platforms>

## Finance architecture and global reform context

- UNFCCC (2025) Report on the Baku to Belém Roadmap to 1.3T.

[https://unfccc.int/sites/default/files/resource/Relatorio\\_Roadmap\\_COP29\\_COP30\\_EN\\_final.pdf](https://unfccc.int/sites/default/files/resource/Relatorio_Roadmap_COP29_COP30_EN_final.pdf)

- OECD (2025). Scaling Finance and Investment for Climate Adaptation: Input paper for the G20 Sustainable Finance Working Group.

[https://g20sfwg.org/wp-content/uploads/2025/07/Financing-climate-adaptation-ENG.PDFO\\_.pdf](https://g20sfwg.org/wp-content/uploads/2025/07/Financing-climate-adaptation-ENG.PDFO_.pdf)

- NDC Partnership (2025) How six countries are mobilizing finance for NDC-aligned projects.

<https://ndcpartnership.org/news/how-six-countries-are-mobilizing-finance-ndc-aligned-projects>

## National and thematic platform examples

- Rwanda Green Fund (n.d.)

<https://greenfund.rw/>

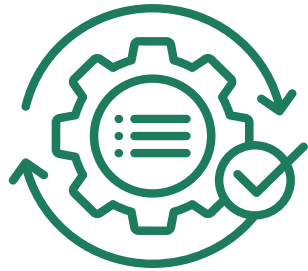
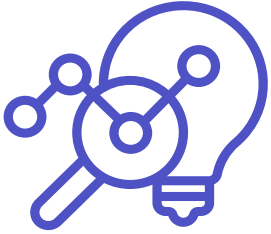
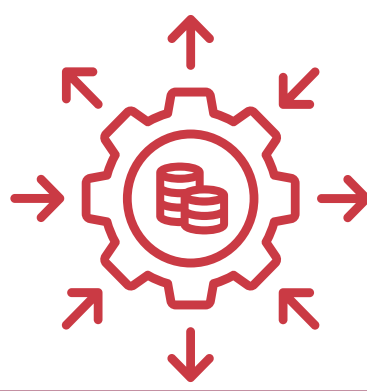
- Ministry of Planning, Economic Development & International Cooperation (2025) Egypt's Country Platform for NWFE (Nexus of Water, Food and Energy) Program.

<https://moic.gov.eg/page/nwfe>

# APPENDIX — TOOLKIT WORKBOOK

Climate &  
Development  
Ministerial

---



# COUNTRY PLATFORMS ACTION TOOLKIT **WORKBOOK**

MOHSEN GUL, ANAA HASSAN, AARON ACUDA AND ROJY JOSHI

# TABLE OF CONTENTS



## 2. DIAGNOSTIC AND READINESS FOR COUNTRY PLATFORM DEVELOPMENT 63

WORKSHEET 2.1: COUNTRY PLATFORM PRINCIPLES AUDIT 64

REFLECTION EXERCISE 2.1: IS A COUNTRY PLATFORM RIGHT FOR US? 65



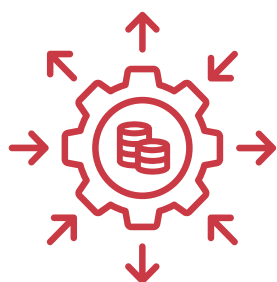
## 3. GOVERNANCE AND INSTITUTIONAL ARCHITECTURE | DESIGNING THE PLATFORM'S ENGINE ROOM 66

WORKSHEET 3.1: GOVERNANCE ROLES AND TERMS OF REFERENCE BUILDER 67

WORKSHEET 3.2: EQUITY AND INCLUSION CHECKLIST 68

WORKSHEET 3.3: CO-ORDINATION MECHANISM SETUP 69

REFLECTION EXERCISE 3.1: IS OUR GOVERNANCE DESIGN FIT FOR PURPOSE? 70



## 4. FINANCE ALIGNMENT AND ARCHITECTURE TRACK, ALIGN, NEGOTIATE, (OPTIONALLY) CHANNEL 71

WORKSHEET 4.1: GRANT-FIRST PRIORITISATION: WHERE SHOULD GRANTS GO? 72

WORKSHEET 4.2: FINANCE MAPPING CANVAS 73

WORKSHEET 4.3: POOLED CLIMATE FUND DESIGN SHEET 74

REFLECTION EXERCISE 4.1: IS OUR FINANCIAL ARCHITECTURE FIT FOR PURPOSE? 75



## **5. PIPELINE DEVELOPMENT AND INVESTMENT PLANNING** | DEVELOPING BANKABLE PROJECTS AND INVESTMENT PLANS ALIGNING WITH NATIONAL NEEDS **76**

WORKSHEET 5.1: PROJECT READINESS ASSESSMENT GRID (PRAG) **77**

WORKSHEET 5.2: PIPELINE PRIORITISATION RUBRIC (PPR) **78**

WORKSHEET 5.3: ENVIRONMENTAL, SOCIAL AND GOVERNANCE SCREENING AND COMPLIANCE CHECKLIST **79**

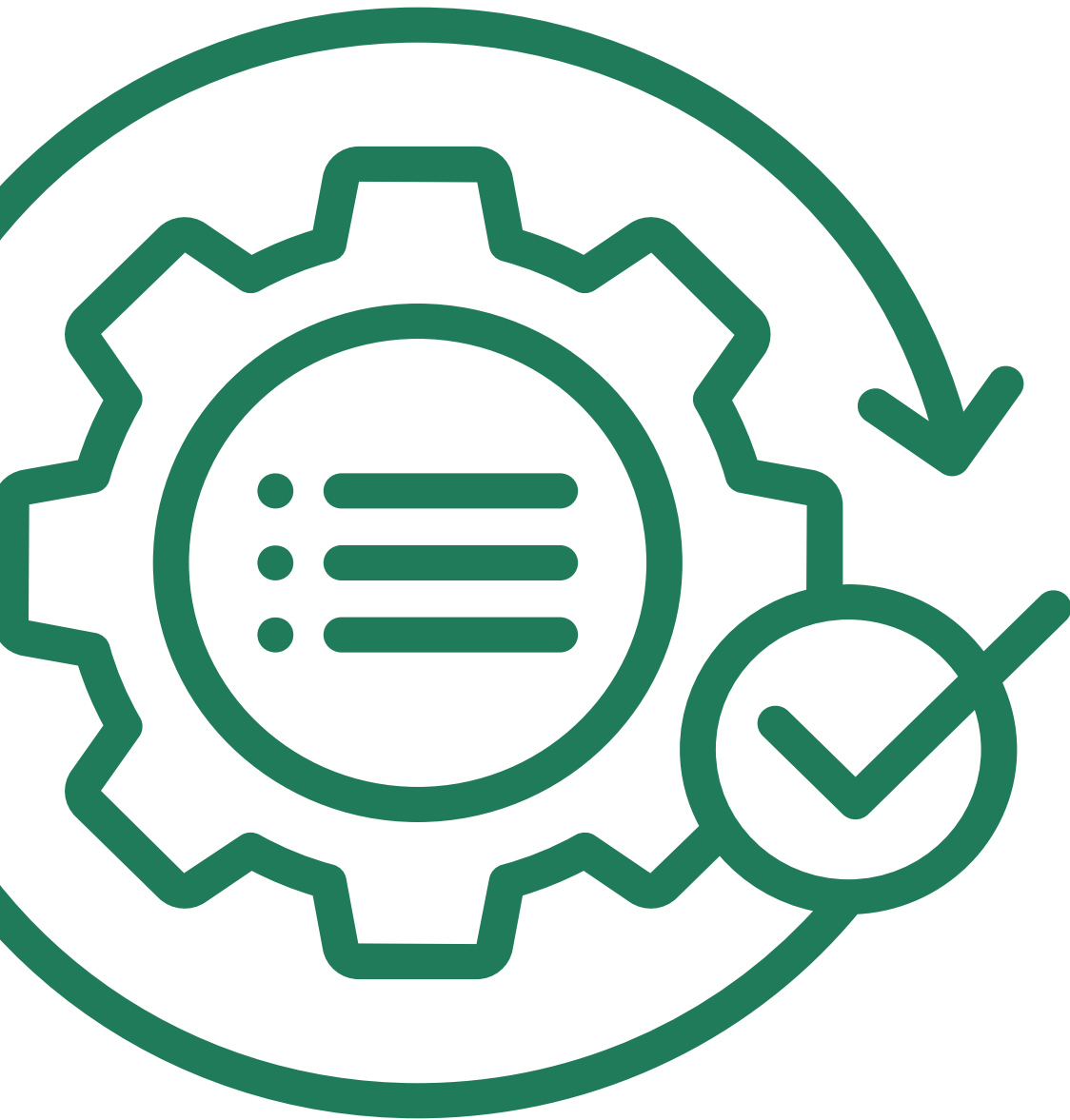


## **6. LEARNING, MONITORING AND SCALING** ADAPTATION, CONTINUOUS IMPROVEMENT AND SUSTAINABILITY **80**

WORKSHEET 6.1: PLATFORM MONITORING, LEARNING AND EVALUATION FRAMEWORK TEMPLATE **81**

WORKSHEET 6.2: ADAPTIVE MANAGEMENT REFLECTION TOOL **83**

WORKSHEET 6.3: SUSTAINABILITY AND SCALE STRATEGY CANVAS **85**



## 2. DIAGNOSTIC AND 2. READINESS FOR COUNTRY PLATFORM DEVELOPMENT

## Worksheet 2.1: country platform principles audit



**Purpose:** to assess whether current or planned national mechanisms align with the core CP principles: country ownership, inclusivity, alignment, transparency, accountability and programmatic delivery

Principle	Description	Key questions	Score (0–2)	Evidence/Notes
<b>Country ownership</b>	Is leadership clearly government-anchored (eg ministry of finance or planning)?	Who leads the process? Is there an endorsed national mandate?		
<b>Whole-of-society inclusion</b>	Are civil society, private sector, local authorities and vulnerable groups formally represented?	Is there evidence of inclusive consultation?		
<b>Alignment with national plans</b>	Does the initiative align with NDCs, NAPs, SDGs and development plans?	Are existing national frameworks referenced?		
<b>Transparency and accountability</b>	Are finance flows and decisions publicly reported?	Are there audit/disclosure systems in place?		
<b>Programmatic approach</b>	Does it co-ordinate multiple funding sources under one strategy?	Are there mechanisms to reduce fragmentation?		
<b>Learning and adaptation</b>	Does it include MEL and feedback loops?	Are lessons integrated into planning?		

**Scoring key:** 0 = Not in place | 1 = Partially in place | 2 = Fully in place

### Instructions for facilitators:

- Convene 8–12 stakeholders (for example from government, development partners or civil society) for a half-day workshop
- Work through each principle collaboratively, citing specific evidence (laws, strategies, minutes)
- Average the scores to create a ‘Principles Heatmap’.

### Output format:

- **Radar/spider chart** illustrating strengths vs gaps
- **One-page summary** of priority improvements (for example ‘Strengthen inclusivity and transparency before CP launch’).



As we close Module 2, it's useful to circle back to the core question. Here is a brief **reflection exercise** to facilitate a final discussion among your team or stakeholders:

### 1. Revisit the why

In one sentence, articulate why you are considering a CP. Does this rationale hold up after learning about prerequisites and alternatives? If the answer is vague or donor-driven ("because others are doing it" or "donors want it"), that's a red flag. A strong answer might be: *"We want to significantly scale adaptation finance by uniting partners behind our NAP."*

### 2. Self-check on preconditions

Ask "If we started a platform next month, what could go wrong here?" For example, *political will* — is there any upcoming election or change that could withdraw support? *Institutional capacity* — do we have at least a core team identified? This thought experiment can reveal if you need to pause and shore something up.

### 3. Explore alternatives one more time

Challenge yourselves — if not a CP, then what? List other ways you could achieve your objectives (for example a series of bilateral agreements, a sector programme and so on), and discuss pros/cons against the CP approach. If you consistently find that those alternatives won't solve the co-ordination or scaling issue you face, then the CP approach is justified. If an alternative seems simpler and almost as effective, perhaps pilot that first.

### 4. Identify support needs. If you proceed, what support will you need?

Reflection here means being realistic about needing technical assistance, funding for design, political support, learning from others and so on. Maybe you need to request a GCF readiness grant, or ask an international expert to help draft an investment plan, or partner with a regional organisation for knowledge exchange. A platform is a heavy lift; recognising you don't have to do it alone is important. Many countries have benefited from South–South learning — consider reaching out to peers (the toolkit can facilitate connections, as it includes case contacts).

### 5. Gauge commitment and convene

Finally, ask each key stakeholder (government ministries, donor representatives, civil society leaders): *"On a scale of 1–10, how committed are you to making a CP work in our country?"* and *"What would increase your commitment?"* This can uncover any hidden reservations or conditions. For example, a minister might say, *"I'm a 7/10 committed; it would be 9/10 if I know the international partners will actually put significant money on the table."* Such insight is valuable so that you can address any issues early. Use it to either build that commitment or help you realise that it's not the right time.

After completing this reflection exercise, you should be in a position to make an informed decision. **It's okay if the conclusion is to delay or not pursue a platform right now** — better to get the preconditions in place first than to have a false start. If the conclusion is to move ahead, you'll do so with eyes open and a clear list of what to strengthen in parallel.

### Next steps

If you decide a CP is indeed right for your context (or at least worth piloting), the subsequent modules in the toolkit will guide you through the *"how"*. Module 2 will delve into designing the governance and institutional structures for your platform, Module 3 into stakeholder engagement strategies, and so on. By tackling Module 1 and 2, you've already laid the most important groundwork — ensuring that the platform is grounded in your country's reality and needs. As one workshop participant in Sevilla noted, *"The magic of a country platform is not in global concepts, but in how it fits our local context"*.

With a clear context and readiness assessment, you are now ready to shape a platform (if you choose to) that truly fits your context. Proceed with confidence, honesty and the willingness to adapt — and you will maximise the chances that your CP, if pursued, will deliver lasting benefits for your nation and people.

# 3. GOVERNANCE AND INSTITUTIONAL ARCHITECTURE

*DESIGNING THE PLATFORM'S  
ENGINE ROOM*



## Worksheet 3.1: governance roles and terms of reference builder



**Purpose:** this worksheet helps define who does what within the CP and avoids overlapping mandates. It can be used in a design workshop with key institutions.

Governance body	Core functions (3–5 only)	Composition (institutions/roles)	Decision space (what it can approve/endorse)	Reporting line
<b>Steering committee (SC)/board</b>	Eg approve investment strategy; endorse major programmes	Eg finance, planning, climate, key sectors, CSO, private sector	Eg approves projects above US\$ X; endorses all major climate finance offers	Eg reports to cabinet or national Climate Commission (NCC)
<b>Technical secretariat</b>	Eg co-ordination, pipeline registry, reporting, MEL	Eg co-ordinator, analyst, MEL officer, comms	Eg clears concepts below threshold; can request revisions	Eg reports to SC
<b>Adaptation working group (WG)</b>	Eg appraise adaptation proposals; advise on NAP alignment	Eg environment, agriculture, local gov, CSOs	Eg provides technical recommendations, no final approval	Eg reports via secretariat to SC
<b>Finance and instruments WG</b>	Eg structure blended finance; advise on instruments	Eg finance, central bank, private finance actors	Eg reviews financing proposals; advises on risk-sharing	Eg reports via secretariat to SC

### How to use:

1. Populate the table with your proposed bodies
2. Check for duplication or gaps in functions and decision space
3. Use the outputs to draft or refine terms of reference for each body.

## Worksheet 3.2: equity and inclusion checklist



**Purpose:** use this checklist when finalising the composition and operating arrangements of your governance bodies.

Dimension	Guiding question	Status (yes/partial/no)	Actions needed/Notes
<b>Gender balance</b>	Are governance bodies comprised of at least 40% women?		
<b>Youth participation</b>	Are youth-led or youth-serving organisations involved in decision-making or advisory roles?		
<b>Indigenous and local voices</b>	Are Indigenous Peoples and local communities formally represented where relevant?		
<b>Accessibility</b>	Are meetings and materials accessible (language, location, online options)?		
<b>Participation support</b>	Are resources (travel, stipends, training) allocated to enable meaningful participation?		
<b>Grievance and feedback</b>	Is there a safe mechanism for marginalised groups to raise concerns and receive a response?		

Completed checklists can be kept as part of the governance manual and revisited annually.

## Worksheet 3.3: co-ordination mechanism setup



**Purpose:** this worksheet helps specify key routines and responsibilities for co-ordination. It can be used when drafting the governance manual or during an inception retreat.

Co-ordination element	Decision/Arrangement (short description)	Responsible actor	Frequency
<b>SC–secretariat link</b>	How decisions are communicated and tracked (minutes, decision log, dashboard)	Secretariat co-ordinator	After each SC meeting
<b>Inter-ministerial co-ordination</b>	How line ministries submit priorities and project concepts	Focal points in each ministry	Monthly/quarterly
<b>WG reporting</b>	Format and timeline for WG recommendations to the secretariat	WG Chairs	Before each SC meeting
<b>Partner engagement</b>	Schedule and format of partner roundtables (eg annual ‘CP investment forum’)	CP chair/secretariat	Annual/semi-annual
<b>Subnational feedback</b>	How provincial/district bodies send inputs and receive feedback	Local government ministry	Regular (eg quarterly)
<b>Public communication</b>	How decisions, pipelines and finance flows are reported to the public	Secretariat comms officer	Annual report and website updates

Once filled, this table can be annexed to the terms of reference of the secretariat and SC.

## Reflection exercise 3.1: is our governance design fit for purpose?



Use this short exercise with your core design team once your draft governance proposal is ready.

### 1. Clarity

Can each person in the room explain in two or three sentences what the SC does, what the secretariat does, and how WGs feed in? If explanations differ significantly, revisit the roles.

### 4. Feasibility

Consider the secretariat and WGs as proposed. With the staff and resources you realistically expect in the next 12–24 months, can this system actually function? If not, what could be simplified or phased (for example starting with fewer WGs and expanding later)?

### 2. Authority

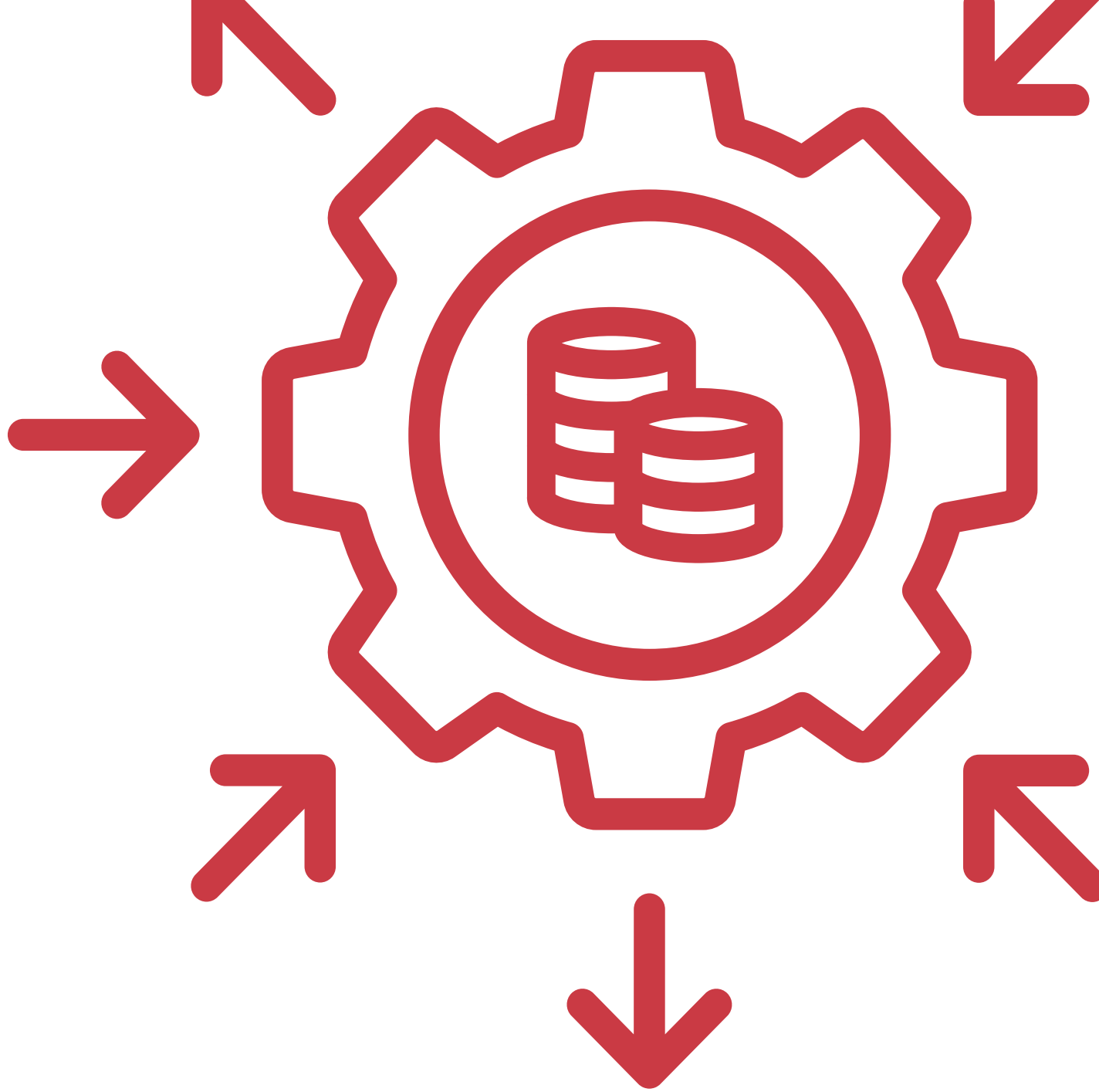
List the three most consequential decisions the platform will take in the next two years (for example endorsing a national investment plan, approving a major programme or setting eligibility criteria for support). Is it clear which body takes each decision, and is that authority backed by a written instrument?

### 5. Resilience

Imagine a change of government or a reshuffle of senior officials within the next two years. Would the platform still exist and be recognisable? If the answer is uncertain, identify one step to strengthen institutionalisation (for example a higher-level decision, or integration into existing laws or regulations).

### 3. Inclusion

Using the equity and inclusion checklist, identify one group whose voice is still weak or missing in the proposed architecture. What one change would most directly strengthen their influence (for example a seat on a body, a dedicated forum or targeted capacity support)?



# 4. FINANCE ALIGNMENT AND ARCHITECTURE

*TRACK, ALIGN, NEGOTIATE,  
(OPTIONALLY) CHANNEL*



**Purpose:** in many LDCs and SIDS, grants remain a critical source of financing for climate resilience, particularly where investments generate high social benefits but limited or no financial returns. However, not all resilience investments require full grant financing. CPs can help governments and partners apply a clear allocation logic to determine where scarce grant resources should be prioritised, and where they can instead be used strategically to unlock concessional or blended finance. This tool helps decision makers assess different types of resilience investments and match them with the most appropriate financing instruments, ensuring that grants are directed toward activities that cannot realistically attract other forms of capital, while leveraging additional finance where revenue streams exist.

### Decision tool: grant allocation logic

Investment type	Recommended instrument	Rationale
<b>Public goods</b> (eg coastal defences, early warning systems, community-level disaster risk reduction)	Grant or concessional grant	No revenue stream; market will systematically under-finance; grant is the only realistic instrument
<b>Social protection and community adaptation</b> (eg climate-smart agriculture for subsistence farmers, water, sanitation and hygiene)	Grant	Communities lack ability to pay; social returns far exceed private returns
<b>Revenue-generating infrastructure with climate co-benefits</b> (eg resilient roads with tolls, urban drainage with user fees)	Blended finance: grant for first-loss/preparation; concessional loan or bond for construction	Identifiable revenue or savings stream exists; blended structure can reduce cost of capital
<b>Private sector adaptation where business case is credible</b> (eg climate-resilient agribusiness, renewable energy with off-takers)	Guarantee, partial credit enhancement or concessional loan	Private actor bears investment risk; public instrument de-risks without crowding out private returns

## Worksheet 4.2: finance mapping canvas



**Purpose:** this worksheet supports a comprehensive overview of the current and potential climate finance landscape for the CP. It can be used as the evidence base for all subsequent design choices.

Category	Domestic public	Domestic private	Bilateral donors	Multilateral climate funds	MDBs/ DFIs	Philanthropy	Innovative/ regional
Source/Institution							
Instrument (grant/ loan/equity/ guarantee/other)							
Main focus (adaptation/ mitigation/L&D/ cross-cutting)							
Approx. volume (US\$)							
Channel (budget/ off-budget/ intermediary)							
Timeframe							
Link to national priority (eg NDC/ NAP target)							
Key issues/ Opportunities							

### How to use:

1. Convene a small team (finance ministry, planning, climate focal point, key partners) and populate the table from existing data
2. Identify patterns (over-reliance on a single donor, very low domestic contribution, almost no private capital, or major thematic gaps)
3. Use the completed canvas to inform which new instruments and vehicles are most needed (for example a pooled fund for adaptation or a guarantee facility for SMEs).

## Worksheet 4.3: pooled climate fund design sheet



**Purpose:** for countries considering a national climate fund, basket fund or 'family of funds' under the CP, this worksheet supports initial design choices.

Design element	Guiding question/Option	Draft choice/Notes
<b>Core objective</b>	What is the fund primarily for (eg adaptation, L&D, cross-cutting)?	
<b>Hosting arrangement</b>	Treasury unit? Semi-autonomous climate fund? NDB?	
<b>Governance structure</b>	Who sits on the fund's board or SC?	
<b>Access modalities</b>	Who can apply and how (line ministries, local governments, CSOs, private sector)?	
<b>Eligible activities</b>	Which sectors/themes are prioritised, and against which criteria?	
<b>Funding sources</b>	Which domestic and external sources will capitalise the fund?	
<b>Fiduciary and safeguards</b>	Which standards will apply (PFM rules, environmental, social, gender)?	
<b>Integration with budget</b>	How will the fund's inflows and outflows appear in national accounts?	
<b>Transparency and reporting</b>	How will decisions and flows be reported to parliament and the public?	

This sheet can be developed into a full design document and used as the basis for consultations with ministries, parliamentarians, development partners and civil society.

# Reflection exercise 4.1: is our financial architecture fit for purpose?



Use this short exercise once you have a draft picture of your CP's financial architecture (instruments, funds and actors).

## 1. Coverage of priorities:

- Looking at your finance mapping canvas, are the country's top adaptation and resilience priorities adequately covered?
- Which two or three priority areas remain under-financed, and what type of instrument or fund would best address those gaps?

## 4. Private sector engagement:

- Is there a realistic pathway for domestic private actors to participate (for example through PPPs, co-financing or SME facilities), or is the idea of 'private sector mobilisation' just rhetoric?
- What single measure could most concretely improve the business case for private participation in adaptation?

## 2. Balance of instruments and risks:

- Does your proposed architecture strike a reasonable balance between grants, concessional loans and commercial instruments, given your debt situation and fiscal space?
- Where are you taking on risk, and is that risk being consciously allocated (for example to grant-funded first-loss facilities, rather than to vulnerable communities or already stretched public budgets)?

## 5. Simplicity and implementability:

- Can your team explain the main financing arrangements (for example pooled funds, blended facilities or key instruments) clearly to a minister or visiting partner in a short briefing?
- If not, which structures can be simplified or phased to ensure the architecture is manageable with your current capacity?

## 3. Role of national institutions:

- Are national financial institutions (for example NDBs, domestic banks and insurers) playing central roles, or is the architecture dominated by external intermediaries?
- What one change would most strengthen domestic ownership (for example, a new on-lending window managed by an NDB, or a domestic guarantee facility)?

Record the responses, identify two or three immediate refinements, and agree a short action list (for example 'finalise design of pooled fund', 'pilot one blended facility with NDB', or 'prepare investment prospectus for priority adaptation programme'). This will help ensure the financial architecture is not only conceptually sound, but also grounded in what is feasible and needed now.

# 5. PIPELINE DEVELOPMENT AND INVESTMENT PLANNING

*DEVELOPING BANKABLE  
PROJECTS AND INVESTMENT  
PLANS ALIGNING WITH  
NATIONAL NEEDS*



## Worksheet 5.1: project readiness assessment grid (PRAG)



**Purpose:** to assess the maturity level of each project in the CP pipeline and identify what support (technical, financial or institutional) is needed to move it toward bankability. Based on the GIF and the GCF Project Preparation Facility (PPF) frameworks, adapted for climate resilience and adaptation pipelines.

Project name/ Code	Climate-Smart Irrigation in Coastal Plains	Urban Resilience Drainage Upgrade	Renewable Microgrid for Island Villages
<b>Sector</b>	Agriculture	Urban/Water	Energy
<b>Linked NDC/ NAP target</b>	NDC Adapt. 2.3	NAP 1.1	NDC Mit. 1.5
<b>Concept note</b>	✓	✓	✓
<b>Pre-feasibility</b>	✓	✓	✗
<b>Feasibility study</b>	✗	✓	✗
<b>Financial model</b>	✗	✓	✗
<b>Lead sponsor identified</b>	MoA	City government	Private development
<b>Stakeholder consultations</b>	Partial	✓	✗
<b>Safeguard screening</b>	Partial	✓	✗
<b>Funding source identified</b>	None	AfDB	None
<b>Overall readi- ness score (0–5)</b>	2.0	4.5	1.0
<b>Remarks/Re- quired actions</b>	Needs PPF support and environmental and social safeguards (E&S) scoping	Ready for financing (AfDB loan)	Seek feasibility grant from GCF PPF

**Scoring key:** 0 = Not started | 1 = Concept only | 2 = Pre-feasibility | 3 = Feasibility complete | 4 = Financial structuring complete | 5 = Fully bankable

### Instructions for facilitators:

1. Compile all ongoing or proposed projects from line ministries, private sector and donors
2. Complete grid using available documentation and verification (for example reports, studies and agreements)
3. Average readiness scores to identify portfolio maturity
4. Tag projects needing PPF or transaction advisory support.

### Output format:

- **Readiness heatmap.** Categorises projects by stage (concept → financing)
- **PPF priority list.** Top ten projects requiring preparation support.

### Frequency:

Twice yearly (aligned with national budget cycles).

## Worksheet 5.2: pipeline prioritisation rubric (PPR)



Purpose: to provide a transparent, data-driven system to rank and select projects for inclusion in the national CP investment pipeline, ensuring prioritisation of high-impact, feasible and equitable initiatives. Informed by NDC Partnership and World Resources Institute (WRI) methodologies.

Criteria	Description	Weight (%)	Scoring guide (1–5)	Example questions	Score	Weighted Score
<b>Climate impact</b>	Potential mitigation/adaptation results (GHG reduced, resilience enhanced)	25	1 = low → 5 = transformative	Does the project deliver measurable resilience for vulnerable groups?	4	1.00
<b>Economic return and cost effectiveness</b>	Cost-benefit, local job creation, avoided losses	15	1 = low → 5 = high	Is the internal rate of return positive and sustainable under sensitivity analysis?	3	0.45
<b>Social inclusion and equity</b>	Gender, youth, Indigenous benefits	15	1 = none → 5 = transformative	Are women/youth actively engaged in delivery and benefit?	5	0.75
<b>Feasibility and readiness</b>	Technical, institutional, financial readiness	15	1 = concept → 5 = bankable	Are feasibility studies and financing plans complete?	4	0.60
<b>Policy alignment</b>	Fit with NDC/NAP priorities and NDP	10	1 = weak → 5 = direct	Is the project linked to a defined NDC or NAP target?	5	0.50
<b>Finance leverage potential</b>	Ability to attract private/blended finance	10	1 = none → 5 = strong leverage	Can the project crowd in co-financing or private capital?	3	0.30
<b>Environmental, social and governance (ESG) safeguards</b>	ESG compliance and co-benefits	10	1 = weak → 5 = strong	Does it comply with national and MDB ESG standards?	4	0.40

**Total weighted score:** sum of all weighted scores (max 5.0).

### Rubric use:

- Projects scoring  $\geq 3.5$  = "Priority 1" (ready to fund)
- 2.0–3.4 = "Priority 2" (needs preparation)
- $< 2.0$  = "Priority 3" (conceptual only)

### Instructions:

1. Use cross-sector scoring committee (for example finance, planning, environment, CSO and private)

2. Each member independently rates projects; secretariat compiles average
3. Discuss top-ranked projects and finalise priority list
4. Document reasons for inclusion/exclusion (transparency requirement).

### Output format:

- Prioritisation matrix (Excel)
- Dashboard visual: bar chart of weighted scores by criterion.

## Worksheet 5.3: environmental, social and governance screening and compliance checklist



**Purpose:** to integrate ESG safeguards into pipeline projects early, ensuring alignment with national laws and international standards (for example IFC, MDBs or GCF).

ESG dimension	Key questions	Status (yes/partial/no)	Notes/Actions required
<b>Environmental</b>	Have risks been assessed through a national/donor framework (eg environmental impact assessment, GCF environmental and social safeguards)?		
	Are mitigation measures identified and budgeted for?		
<b>Social</b>	Have gender and social inclusion impacts been analysed?		
	Are Indigenous People and local community consultations complete?		
<b>Governance</b>	Is there a clear accountability structure for grievance handling?		
	Is corruption risk assessed and mitigation in place?		
<b>Labour and safety</b>	Do contractors follow labour, occupational health and safety, and procurement standards?		
<b>Biodiversity/Land use</b>	Does the project avoid sensitive ecosystems?		
<b>Transparency and disclosure</b>	Has the environment and social impact assessment summary been published?		

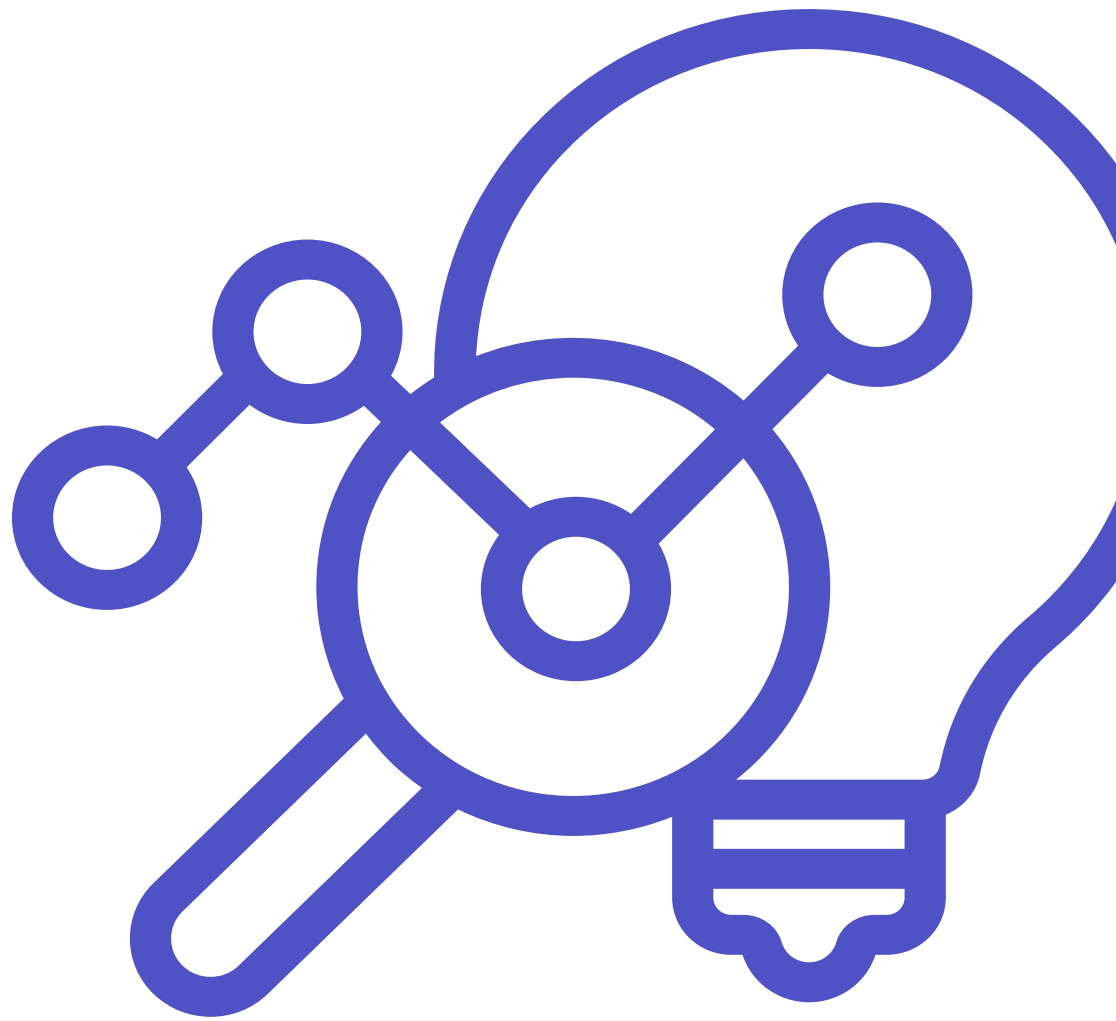
**Rating:** Fully compliant = Green | Partial = Amber | Non-compliant = Red

### Instructions:

1. Project developers fill in checklist at pre-feasibility stage
2. Secretariat or designated safeguard officer verifies
3. Non-compliant projects flagged for remedial action before financing approval.

### Output format:

- **ESG scorecard and summary table**
- Compliance status integrated into **pipeline prioritisation rubric**.



# 6. LEARNING, MONITORING AND SCALING

*ADAPTATION, CONTINUOUS  
IMPROVEMENT AND  
SUSTAINABILITY*

## Worksheet 6.1: platform monitoring, learning and evaluation framework template



**Purpose:** to design a MEL framework that focuses on resilience outcomes, systems change and learning, rather than just project-level outputs. It follows a logical framework (logframe)-style structure tailored to CPs, and explicitly embeds learning questions.

MEL summary table				
Level (impact/ outcome/ output/process)	Impact	Outcome	Output	Process/Learning
<b>CP objective/ Result area</b>	Eg strengthened climate resilience for vulnerable communities in X regions	Eg local governments have increased capacity and finance for locally led adaptation	Eg functioning platform governance and MEL systems in place	Eg continuous learning and South-South exchange institutionalised
<b>Key indicators (incl. equity and systems change)</b>	Eg % of households reporting improved resilience; reduction in climate-related losses; perceived resilience index disaggregated by gender, age etc	Eg % of climate budget devolved to local gov.; no. of districts with active climate committees; quality score of local climate plans	Eg. no. of SC meetings held with quorum; % decisions implemented; MEL system operational; % indicators with up-to-date data	Eg no. of peer exchanges; no. of documented lessons; no. of adjustments made based on evidence; feedback from peer countries
<b>Baseline (year)</b>	2024: ...	2024: ...	2024: ...	2024: ...
<b>Target and time-frame</b>	2030: ...	2027: ...	2026: ...	2025–28: ...
<b>Data sources and methods (incl. participatory)</b>	National surveys; local participatory assessments; government statistics; CP dashboard	Budget tagging; administrative data; local committee reports; targeted capacity assessments	Meeting minutes; MEL system logs; secretariat reports	Learning workshop reports; hub analytics; short 'after action review' notes; peer feedback
<b>Frequency (reporting/Review)</b>	Annual/mid-term/end-line	6–12 monthly	Quarterly/annual	After major milestones/annually



## MEL summary table

Level (impact/outcome/output/process)	Impact	Outcome	Output	Process/Learning
<b>Responsible actors (national/local/non-state)</b>	CP SC; planning ministry; line ministries; CSO networks	CP secretariat; local government ministry; LIFE-AR-style task team	Secretariat; MEL WG; line ministry focal points	MEL WG; international partners; South–South learning hub
<b>Learning questions (what do we need to understand?)</b>	What major assumptions about how resilience is built may not be holding? Are some groups being left behind despite overall progress?	Are devolved funds reaching the most climate-vulnerable groups? What capacity gaps still constrain local delivery?	Which aspects of governance or MEL are not functioning as planned? Where are delays or bottlenecks?	What have been our most important surprises (positive/negative)? Which practices should we stop, start or scale?
<b>Use of findings (how will this inform decisions?)</b>	Adjust long-term strategy; inform NDC/NAP updates; shape negotiations with funders	Reallocate support (technical assistance (TA), training, devolved funds); refine devolved finance design; prioritise additional districts/regions	Adjust TORs; streamline processes; update governance manual; revise MEL indicators and responsibilities	Update CP design; feed into regional/global advocacy; inform future funding proposals and platform reforms

### How to use:

#### 1. Start from CP objectives

- List 3–6 core CP objectives/result areas (not every project activity).

#### 2. Define indicators that capture systems change and equity

- Include at least one indicator on: resilience outcomes, inclusion (for example gender, youth or Indigenous Peoples) and finance effectiveness.

#### 3. Embed learning questions

- For each level, add 1–2 learning questions about assumptions, trade-offs or distributional effects.

#### 4. Clarify responsibilities and frequencies

- Assign clear leads (for example national, local or non-state) and realistic frequencies to avoid overburdening the system.

#### 5. Plan for integration with national systems

- Align indicators and data sources with existing NDC/NAP/SDG monitoring frameworks where possible.

#### 6. Review and adapt regularly

- Revisit the table at least annually to refine indicators, questions and use of findings as the platform evolves.

## Worksheet 6.2: adaptive management reflection tool



**Purpose:** to run a periodic ‘health check’ on the platform, capturing perceptions from government, civil society, local actors and partners, and using findings to adjust strategy and operations. It is designed for use every 6–12 months.

### Reflection rating sheet

#### Instructions:

- Each participant rates statements 1–5 (1 = strongly disagree/poor; 5 = strongly agree/excellent)
- Ratings can be collected anonymously
- After scoring, discuss patterns and agree course corrections.

Domain	Reflection statement	Rating (1–5)	Comments/Examples
<b>1. Reaching climate-vulnerable groups</b>	Our platform’s activities and finance are reaching the most climate-vulnerable communities and groups.		
	We have sufficient evidence to know who is being left out and why.		
<b>2. Inclusion and decision making</b>	Decision-making processes are inclusive and give meaningful voice to local actors, women, youth and Indigenous Peoples.		
	Stakeholder participation mechanisms (committees, forums) are functioning as intended.		
<b>3. Timelines and delivery</b>	Funds are disbursed in a timely manner to national and local implementers.		
	Implementation bottlenecks are identified quickly and acted upon.		
<b>4. Learning and adaptation</b>	Evidence and feedback (including from communities) are regularly used to adjust strategies and operations.		
	We feel safe to discuss failures and unintended outcomes, and these are treated as learning opportunities rather than reasons for blame.		
<b>5. Governance and co-ordination</b>	Roles and responsibilities across ministries, levels of government, and partners remain clear and are respected.		
	Co-ordination mechanisms (eg platform SC, working groups) are adding value rather than duplicating other forums.		
<b>6. Finance effectiveness</b>	Platform finance is aligned with national priorities and is reducing fragmentation (fewer, better-co-ordinated projects).		
	The mix of instruments (grants, loans etc) and channels appears appropriate for our context and fiscal situation.		



## Qualitative learning prompts

After ratings, invite short written responses to these questions:

### 7. Biggest successes

- What are the two most significant positive changes the platform has contributed to in the last period?

### 8. Biggest challenges/failures

- What has not worked as expected? What surprised you?

### 9. Emerging risks or unintended effects

- Have any groups been negatively affected or left out? Are any political, fiduciary or social risks emerging?

### 10. Key adjustments for the next 6–12 months

- If you had to choose only three adjustments for the platform in the next period, what should they be?

## How to use

- Apply the tool before annual reviews or strategy retreats
- Collate scores (averages per domain) and anonymised comments
- Present results in a simple ‘traffic light’ summary (green/amber/red per domain)
- Agree concrete follow-up actions (with owners and timelines) and record them in meeting minutes and workplans
- Revisit previous results to see whether actions have improved ratings.



**Purpose:** a one-page canvas to help teams plan how the platform will endure, grow and become part of the country's institutional DNA. It encourages explicit thinking about value proposition, ownership, financing, capacity, risks and opportunities over a 5–10-year horizon.

### Strategy canvas

You can lay this out as a single A3 sheet with boxes, but below is the content structure.

Section	Guiding questions/Prompts	Notes/Inputs
<b>1. Vision and value proposition</b>	In ten years, what unique value should the platform still be providing? Why must it endure (for communities, state, partners)?	
<b>2. Core functions to institutionalise</b>	Which functions must be sustained (eg co-ordination, MEL, devolved finance, pipeline management)? Which could be phased out or delegated?	
<b>3. Long-term ownership and governance</b>	Which institutions should 'own' the platform in 5–10 years (ministries, local gov, national funds, councils)? How should governance evolve as it scales?	
<b>4. Legal and policy anchors</b>	What legal, policy or regulatory changes are needed to embed the platform (eg climate act, finance law, cabinet decisions)?	
<b>5. Financing model for core functions</b>	How will core costs (secretariat, MEL, local facilitation) be funded over time? National budget line, levies, basket fund, endowment, recurring donor support, private contributions?	
<b>6. Capacity and system gaps for scale</b>	What capacity, systems or infrastructure gaps could block scaling (eg subnational capacity, PFM, data systems, fiduciary standards)?	
<b>7. Scaling pathways</b>	How exactly will you scale? By geography (more districts/regions), by sectors (new themes), by finance volume or by replication in other countries? What is the phased plan (3, 5, 10 years)?	
<b>8. Key partners and alliances</b>	Which domestic and international partners are critical for long-term sustainability (eg MoF, parliament, MDBs, climate funds, civil society coalitions, regional bodies)?	



Section	Guiding questions/Prompts	Notes/Inputs
<b>9. External opportunities</b>	Which upcoming opportunities can be leveraged (eg COP pledges, new climate funds, IMF/World Bank programmes, election windows, reform agendas)?	
<b>10. External risks/Threats</b>	What external shocks or political changes could undermine the platform (elections, fiscal crises, donor exits)? How can we mitigate or hedge against them?	
<b>11. 12–24-month priority actions</b>	Based on all of the above, what are the top 5–7 concrete actions we must take in the next 1–2 years to put the platform on a sustainable and scalable footing?	

### How to use

- Use in a **half-day strategy session** with core platform leaders (government, local reps, civil society and key partners).
- Populate sections in small groups, then consolidate.
- Prioritise the **12–24-month actions** and assign leads, timelines and resourcing.
- Revisit the canvas every **1–2 years** to track progress and update assumptions, especially around risks, opportunities and ownership.