



PrivABoo

PrivABoo Module on Financing Opportunities for Adaptation SMEs

Training Manual



Implemented by:

giz Deutsche Gesellschaft
für Internationale
Zusammenarbeit (GIZ) GmbH

Table of Contents

1.	Introduction	2
2.	Workshop Objectives	3
3.	Product Overview.....	4
4.	Training Methods	5
5.	Agenda & Schedule	6
6.	Classroom Guidelines	9
7.	Exercises, Activities, Case Studies & Assignments Overview	10
8.	Presentation Notes and Running Orders for Trainers	11
9.	Evaluation & Follow-Up.....	12
10.	Other recommended Handouts & Resources	13
	Disclaimer	13

1. Introduction

Brief overview of the training

Given the potentially high sustainable development impact of climate adaptation ventures, there is a growing interest from impact investors in climate change adaptation. Awareness of and access to tangible investment opportunities still remain limited. According to the Global Risk Institute¹, investors struggle to assess the climate resilience of businesses and evaluate their investment portfolios in the context of adaptation to climate change. This poses a challenge for innovators and entrepreneurs to find funding opportunities, which is especially relevant for adaptation-relevant Small and Medium-Sized Enterprises (SMEs). They may struggle to access investments that allow them to sustain and grow their adaptation business models.

Many adaptation SMEs struggle to identify the most suitable financing pathways due to limited exposure to investors and a lack of understanding of what different funders look for. By strengthening their capacity to recognize relevant financing opportunities, assess investor requirements, and navigate the broader impact financing ecosystem, these SMEs can position themselves more strategically for investment. This improved readiness enables them to approach the right financiers with confidence, align their business models with investor expectations, and ultimately increase their chances of securing climate adaptation financing. This training is designed to equip Adaptation SMEs with the skills to tackle these challenges.

The Private Adaptation Investment Bootcamp (PrivABoo)

The training module has been developed as part of the Private Adaptation Investment Bootcamp (PrivABoo). PrivABoo is a peer-learning approach targeting practitioners (entrepreneurs, start-ups, companies, investors, accelerators, enterprise support organizations, ...) at various stages of climate change adaptation investments and finance, mixing & matching different learning formats (networking, dialogue, training and individual advisory services), with the aim to equip small- and medium-sized enterprises (SMEs) and impact investors with tools, information, and skills to scale up SMEs with business models in the field of climate change adaptation & resilience, build a network that enables knowledge sharing, business creation and acceleration, and innovation partnerships, and develop a scalable approach to promote private adaptation finance and investments.

PrivABoo is a product of the project Private Adaptation Finance (part of the global GIZ climate project NDC Assist II), which is implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, on behalf of the German Federal Ministry for Economic Cooperation and Development, until the end of 2025.

¹ Global Risk Institute. (2020). Managing Climate Risk: The Implications for Investors. Retrieved from <https://globalriskinstitute.org/publications/managing-climate-risk-the-implications-for-investors/>

2. Workshop Objectives

The aim is to equip Adaptation SMEs with the skills to identify suitable financing opportunities, understand investor requirements, and navigate the impact financing ecosystem effectively.

The Module on Financing Opportunities for Adaptation SMEs and peer-exchange will focus on:

- helping SMEs to gain a better understanding of available funding sources and financing opportunities for Adaptation SMEs.
- supporting SMEs in understanding how to find the right investor and funding instruments based on their business case, current status, needs, and goals.
- providing SMEs with the knowledge and tools they need to access funding, navigate the financial ecosystem, and drive sustainable climate adaptation initiatives.

Expected key takeaways

- ✓ Participants can identify suitable sources of funding for their adaptation initiatives.
- ✓ SMEs can identify the right criteria to find the right investor for their venture.
- ✓ SMEs have access to an overview of different tools, databases, and resources that they can use to identify financing opportunities
- ✓ SMEs can identify and map the Impact financing ecosystem within their country and regions

3. Product Overview

This Financing Opportunities for Adaptation SMEs module is composed of **two and a half days in-person workshop**. The **sessions** are focused on technical inputs and learning, alongside peer exchange and the development of concrete plans to access funds. The sessions are also accompanied by individual assignments tailored to the respective SMEs and the preparation of materials for the peer learning sessions.

Day 1: Adaptation Narrative Recap & Identifying Financing Opportunities for SMEs

Objective: SMEs will recap and understand the main concepts and the learnings from the PrivABoo Modules. They will understand the basics of different financial mechanisms and their implications, through concepts to practical examples.

Key Components:

- Introduction to climate finance: debt, equity, venture debt, risk transfer/sharing instruments and mechanisms, and other financial instruments.
- Criteria for selecting financial instruments.
- Overview and Identification of other sources of funding and revenue-generating activities for climate adaptation projects, innovative or alternative sources of funding.

Day 2: Accessing Climate Finance Resources

Objective: SMEs will be equipped with the knowledge and tools to identify the right investors and financing instruments that match their business model, stage, needs, and goals, enabling them to access funding effectively, navigate the financial ecosystem, and advance sustainable climate adaptation initiatives. **Key Components:**

- Fundraising journey and experience from SMEs.
- Successful fundraising & gap analysis.
- Climate Investor Landscape & Impact Investment for Adaptation SMEs.

Day 3: SMEs Action Plan

Objective: SMEs will develop their 18-month growth plans by identifying how they can leverage PrivABoo to advance their next phase of development. **Key Components:**

- SMEs Action Plans.
- Reflection on the key findings

In-Person Module on Financing Opportunities for Adaptation SMEs

- **Hands-on exercises with real business cases.**
- **See section 7. Exercises & Activities, for more details on the dynamics to develop.**

The exercises In-person workshop meetings are designed to be conducted in groups of 5-6 SMEs. This depends on the number of facilitators and the physical capacities of the workshop venue. Breakout rooms are recommended so that each group can practice the group dynamics in separate rooms.

4. Training Methods

To enhance participant engagement and learning, the Workshop uses a variety of interactive methods. The sessions include Icebreakers, where participants share a short personal experience related to adaptation, fostering connection, and setting the stage for discussion. Case Study Analysis is included, where participants review a successful adaptation communication strategy, gaining insights into effective messaging and stakeholder engagement. Through Role Play, participants practice delivering key messages to different stakeholders, refining their communication skills in a realistic setting. Lastly, a Workshop Design Exercise allows participants to apply their learning by developing a mini-adaptation communication plan, ensuring practical application and a deeper understanding of the concepts discussed.

The sessions encompass the following training methods:

- **Lecture:** Provide theoretical knowledge and key concepts.
- **Group Discussion:** Encourage exchange of ideas and peer learning
- **Case Studies:** Analyze and develop examples based on the participants' companies.
- **Role-Playing:** Simulate practical application of communication skills
- **Hands-on Exercises:** Engage in practical activities to reinforce learning
- **Peer learning presentation:** Participants share their results of an exercise or group work with the plenary
- **Guest Speaker Sessions:** Gain insights and inspiration from experienced practitioners, including entrepreneurs, investors, and industry experts.

Such elements should also be considered:

- **Cultural Sensitivity & Inclusivity:** Participants may come from diverse backgrounds and contexts. Encourage open discussions while respecting different perspectives on climate adaptation.
- **Tailoring Content:** Adapt the training materials to suit the specific knowledge level and expertise of the participants and their contexts in their countries.

5. Agenda & Schedule

Please find below the proposed times and durations for every session and its respective topics to develop (You can find the agenda as an individual document in the [Exercises and Materials](#) folder that comes with this training manual).

General remarks before the in-person workshop:

- **Send invitations and reminders to participants;**
- **Share the agenda and logistical details with participants;**
- **Give specific recommendations regarding accommodation, transfers, meals, and travel arrangements; organise and coordinate something, if required;**
- **Decide if you want to organise a dinner for the whole group or not;**
- **You can find all background information and contents in the PowerPoint in the Exercise & Material folder.**

Day 1 Add Date –Recap & Identifying Financing Opportunities for SMEs

Time	Activity / Topics	Place
8.30	Participant registration.	Foyer
9:00	Plenary Session: Opening Formal opening of the meeting, followed by an introduction to the program and the specific goals and outcomes of the day.	Plenary
9:30	Participants Introduction & Expectations. Facilitators facilitate the introduction dynamic where the SMEs get to know each other and discuss: <ul style="list-style-type: none"> • About the discussed expectations and how to meet them. • Their Adaptation Relevance. 	Plenary
10:30	Coffee break	
11:00	1st Session: Recap and harness the learnings from the Training Modules. Quick Recap by Facilitators followed by a Quiz: <ul style="list-style-type: none"> • Adaptation Narrative • Impact Measurement • Communication • Gender Mainstreaming • Quiz Plenary discussion with the SMEs on key outcomes of each topic.	Plenary
12:30	2nd Session: Current State of SMEs SMEs discuss where they were , where they are now . In terms of: <ul style="list-style-type: none"> • Addressing climate adaptation challenges • Governance • Training • Impact measurement and communication • Partnerships • Investment readiness 	Breakout rooms



	<ul style="list-style-type: none"> • Gender lenses for their business • Climate adaptation financing, funds raised, investment exposure. Etc. <p>SMEs prepare posters individually and present them in peer groups.</p>	
13:00	Lunch	
14:00	<p>2nd Session: Current State of SMEs Continuation on SMEs discussion on where they were, where they are now. SMEs prepare and present them in peer groups.</p>	Breakout rooms
15:30	Coffee break	
16:00	<p>3rd Session: Overview of Financing Opportunities for SMEs Facilitators provide an overview of different Financing Opportunities for SMEs</p> <ul style="list-style-type: none"> • Introduction to climate finance: debt, equity, venture debt, risk transfer/sharing instruments and mechanisms, and other financial instruments. • Criteria for selecting financial instruments. <p>Overview and Identification of other sources of funding and revenue-generating activities for climate adaptation projects, innovative or alternative sources of funding.</p>	Plenary
17:00	Closing of the session and reflection on the key findings of the day	Plenary

Day 2 Add Date – Accessing Climate Finance Resources

Time	Activity / Topics	Place
9:00	<p>Plenary Session: Opening</p> <ul style="list-style-type: none"> • Introduction of the agenda and expected outcomes of the day. • Reflections on the previous day's learnings. 	Plenary
9:30	<p>4th Session: Fundraising journey and experience from SMEs SMEs reflect on the lessons, insights, opportunities, and challenges they face when closing funding and investment deals.</p> <ul style="list-style-type: none"> • Successful fundraising & gap analysis • Companies that received investments: share learnings, resources / Q&A, dos & don'ts. • Companies that didn't: develop a gap analysis. <p>SMEs prepare posters individually.</p>	Breakout rooms
10:30	Coffee break	
10:50	<p>4th Session: Fundraising journey and experience from SMEs SMEs present posters in peer groups; groups collect the most important experiences on a poster.</p> <p>SMEs discuss their main findings and reflections in the plenary room, followed by a Virtual Input from SME on their Fundraising Journey.</p>	Breakout rooms
13:00	Lunch	



14:00	<p>5th Session: Climate Investor Landscape & Impact Investment for Adaptation SMEs</p> <ul style="list-style-type: none"> • The Climate Investor Landscape and Sources of funding for climate adaptation projects • Finding the right investor (criteria, credibility, greenwashing) • Impact financing ecosystem mapping dynamic <p>Facilitators provide an overview as well about different tools, databases, and resources that the SMEs can use to identify financing opportunities in their region.</p>	Plenary
15:30	Coffee Break	
16:00	Closing of the session and reflection on the key findings of the day	Plenary

Day 3 Add Date – SMEs Working session

Time	Activity / Topics	Place
9:00	<p>Plenary Session: Opening</p> <ul style="list-style-type: none"> • Introduction of the agenda and expected outcomes of the day. • Reflections on the previous day's learnings. 	Plenary
09:20	<p>7th Session: Future Plans, Develop an Action Plan for the next 18 months.</p> <p>SMEs develop their plans for the next 18 months in their peer groups. How do you intend to leverage PrivABoo for the next phase of your business? For training, perhaps building sustainable partnerships for growth, addressing challenges specific to climate adaptation businesses, or climate adaptation financing, fundraising.</p>	Breakout rooms
10:30	Coffee Break	
10:50	<p>Continuation of 7th Session: Future Plans, Develop an Action Plan for the next 18 months.</p> <p>SMEs present their plans for the next 18 months in their peer groups.</p>	Breakout rooms
12:00	<p>Closing Remarks & Outlook</p> <ul style="list-style-type: none"> • Reflection on the key findings of the workshop and program • End-of-programme evaluation. • Award of certificates for completion of the program • Group photo. 	Plenary
13:00	Lunch	

6. Classroom Guidelines

Establish Ground Rules for a Collaborative Learning Environment

To create a productive and inclusive learning space, it is essential to establish ground rules at the beginning of the training. These rules should be agreed upon by participants to ensure a respectful and engaging environment. Some suggested ground rules include:

- Listen actively and respectfully to others.
- Encourage open and honest discussions.
- Be mindful of speaking time to allow everyone to contribute.
- Maintain confidentiality where necessary to create a safe space.
- Keep mobile phones on silent and minimize distractions.
- Approach disagreements with curiosity rather than conflict.

Trainers should facilitate a discussion with participants to co-create and document these ground rules, making sure they are visible throughout the training.

Encourage Active Participation, Peer Learning, and Respect for Diverse Perspectives

A successful training session relies on active engagement from all participants. To foster this, trainers should:

- Use a variety of interactive techniques such as group discussions, role-playing, and hands-on exercises.
- Encourage participants to share their experiences, insights, and perspectives.
- **Promote peer learning** by fostering collaboration and knowledge-sharing among participants.
- Create an inclusive atmosphere by ensuring that all voices are heard and valued.
- Respect different learning styles by balancing lectures with participatory activities.
- Provide opportunities for reflection and peer feedback.

Peer learning plays a crucial role in reinforcing concepts and enhancing practical understanding. By exchanging insights and best practices, participants can collectively strengthen their adaptation impact strategies.

Use Visual Aids and Storytelling for Effective Communication

Visual aids and storytelling techniques can enhance understanding and retention of key concepts. Trainers should:

- Use slides, infographics, and videos to present complex ideas in a clear and engaging way.
- Incorporate real-life case studies and success stories to illustrate key points.
- Encourage participants to share their own experiences through structured storytelling exercises.
- Utilize charts, diagrams, and other visual elements to simplify data-heavy content.
- Adapt visual and storytelling techniques to suit the audience's needs and preferences.

By integrating these methods, trainers can make the learning experience more engaging, relatable, and impactful.

7. Exercises, Activities, Case Studies & Assignments Overview

In this section of the manual, the facilitators can find all the materials and exercises that participants should prepare before the sessions, during the in-person meeting, and after the workshop. Materials are divided according to the activities and can be found in the [Exercises and Materials](#) folder that comes with this Manual.

Preparation Exercises and Materials

7.1 In-Person Meeting Preparation

Proceed to ask all participating SMEs **to prepare for the discussions by:**

- **Focusing on Measuring adaptation impact**, checking out the following resources:
 - Revisit the material and information from the previous Core Group meetings on the topics of Adaptation Narrative, Impact Measurement, Communication, and Gender Mainstreaming.
 - Check the preparation materials guide. Bring a draft version of the exercises; this will help us advance some work and make the best use of the time during the workshop.

In order to be able to make the most out of the in-person meeting, proceed to ask all participating SMEs to bring a draft of their:

- 2. Current State of SMEs.
- 3. Fundraising Journey / Gap Analysis.
- 4. SMEs Future plans

7.2 During In-Person Meeting

The previous and following exercises can be found inside the Workshop Background Slides and the [Exercises and Materials](#) folder as well. Every exercise comes with its respective indications.

- Previous exercises will be developed as well during the workshop.
- 5. Mapping the Climate Investment Landscape

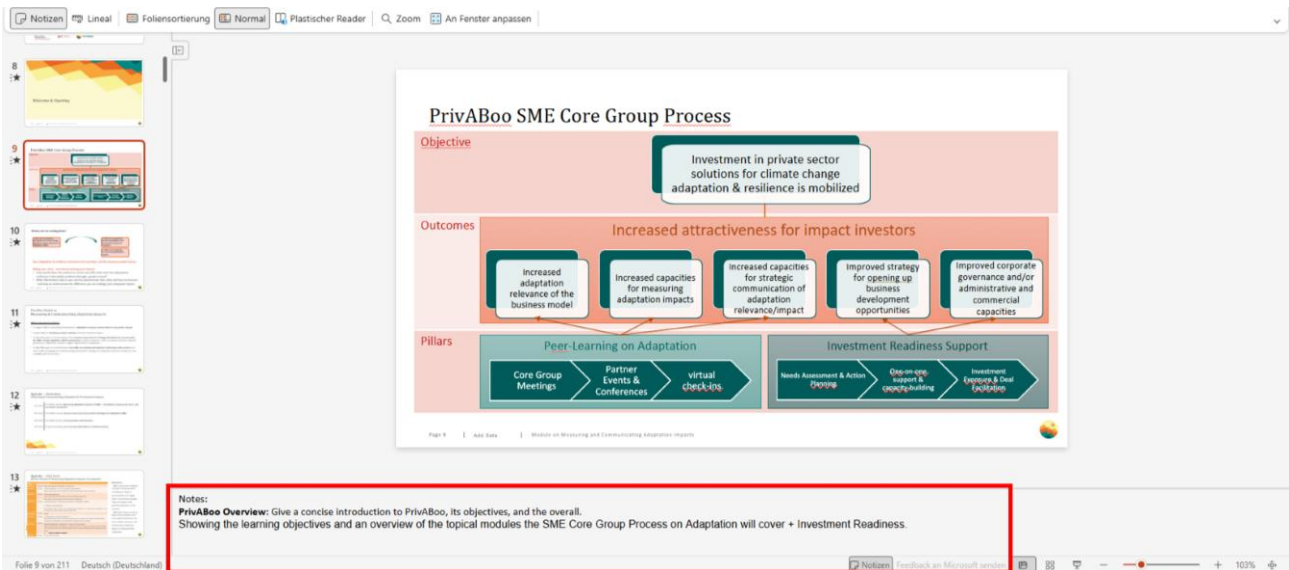
7.3 At the end of the In-Person Meeting

- 6. Feedback questionnaire.

8. Presentation Notes and Running Orders for Trainers

8.1 Background slides

The Background Slides for the Online Sessions and the In-Person Meeting are designed to provide trainers with a structured approach to providing content efficiently. For the **online sessions**, the **slides contain notes and instructions**, as shown below in the red frame, providing essential guidance for facilitators on developing both short and long training sessions, ensuring key messages are conveyed clearly, and incorporating interactive elements to enhance participant engagement. Trainers should use the slides as a foundation but adapt them as needed to fit the audience's level of expertise and engagement style.



The screenshot shows a presentation slide titled "PrivABoo SME Core Group Process". The slide is structured into three main sections: Objective, Outcomes, and Pillars.

- Objective:** Investment in private sector solutions for climate change adaptation & resilience is mobilized.
- Outcomes:** Increased attractiveness for impact investors. This section includes five sub-outcomes:
 - Increased adaptation relevance of the business model
 - Increased capacities for measuring adaptation impacts
 - Increased capacities for strategic communication of adaptation relevance/impact
 - Improved strategy for opening up business development opportunities
 - Improved corporate governance and/or administrative and commercial capacities
- Pillars:**
 - Peer-Learning on Adaptation:** Core Group Meetings → Partner Events & Conferences → Virtual Check-ins
 - Investment Readiness Support:** Needs Assessment & Action Planning → Organizational Support & Capacity Building → Investment Support & Deal Execution

At the bottom of the slide, a red box highlights the following note:

Notes:
PrivABoo Overview: Give a concise introduction to PrivABoo, its objectives, and the overall. Showing the learning objectives and an overview of the topical modules the SME Core Group Process on Adaptation will cover + Investment Readiness.

8.2 Facilitator Running Orders

For the **in-person meeting**, facilitators will use Running Orders as a structured guide to effectively conduct the workshop. These Running Orders serve as a key tool, outlining the flow of activities, required materials, and exercises to be executed at specific times. They also include key remarks, messages, and essential information that participants need to develop throughout the workshop, ensuring a smooth and impactful learning experience. These can be found in the [Exercises and Materials](#) folder that comes with this Manual.

9. Evaluation & Follow-Up

Evaluation is a crucial component of the training process as it allows both trainers and participants to assess the effectiveness of the workshop, identify key takeaways, and highlight areas for improvement. Gathering feedback helps ensure that learning objectives are met and provides insights for refining future training sessions. Additionally, evaluation fosters a culture of continuous learning by encouraging participants to reflect on their progress and how they can apply the acquired knowledge and skills in their professional contexts.

For this purpose, 2 key activities are defined.

- **Review and recap session:** at the end of the workshop where participants should discuss personal key learnings and findings from the workshop, and which next steps they can implement to establish or further develop the impact measurement and communication at the level of their companies.
- **Feedback Questionnaire:** Collect insights on workshop effectiveness. The questionnaire can be found below, as well as in the [Exercises and Materials](#) folder that comes with this Manual.

10. Other recommended Handouts & Resources

Facilitators can send the following materials to participants before online sessions and in-person meetings to help them familiarize themselves with key concepts that will be covered during the workshop. These materials not only support participants in building a foundational understanding but also provide facilitators with deeper insights, enhancing their ability to guide discussions and address questions effectively.

- GIZ (2024). Private Capital Financing Options for Climate Relevant SMEs and Startups Beyond Equity Deals. <https://www.adaptationcommunity.net/publications/private-capital-financing-options-for-climate-relevant-smes-and-startups-beyond-equity-deals/>
- GIZ (2025). Funding Landscape and Opportunities for SMEs and Startups in Pakistan’s Climate Sector. <https://www.adaptationcommunity.net/publications/pakistan-funding-landscape/>
- The Climate Policy Initiative (2024). Building Financial Instruments for Climate Adaptation. <https://www.climatefinancelab.org/wp-content/uploads/2024/12/Building-Financial-Instruments-for-Climate-Adaptation.pdf>

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PrivABoo Module on Financing Opportunities for Adaptation SMEs

Training Manual



Implemented by:



Introduction: Note to trainers

- **Growing Demand for Adaptation Finance:** Investors and development financiers are increasingly seeking high-impact adaptation solutions, creating significant opportunities for SMEs positioned in this space.
- **Knowledge Gaps in Financing Options:** Many adaptation SMEs lack clarity on the types of financing available and struggle to determine which instruments best match their business models and growth stage.
- **Investor Expectations & Requirements:** SMEs often face challenges in understanding what investors look for, including financial performance, scalability, climate rationale, and impact potential, making it difficult to present compelling investment cases.
- **Challenges Navigating the Ecosystem:** The impact financing landscape is complex and fragmented. Limited networks and exposure hinder SMEs from connecting with relevant investors and accessing specialized adaptation finance mechanisms.
- **Importance of Accurate Impact Communication:** Understanding key principles and best practices in adaptation impact measurement is crucial for securing investment.
- **Funding Barriers for SMEs:** Adaptation-focused SMEs often struggle to secure investment needed for growth and sustainability.



Toolkit Introduction: Objective & Target Group

The aim is to equip Adaptation SMEs with the skills to identify suitable financing opportunities, understand investor requirements, and navigate the impact financing ecosystem effectively.

The Module on Financing Opportunities for Adaptation SMEs and peer-exchange will focus on:

- helping SMEs to gain a better understanding of available funding sources and financing opportunities for Adaptation SMEs.
- supporting SMEs in understanding how to find the right investor and funding instruments based on their business case, current status, needs and goals.
- providing SMEs with the knowledge and tools they need to access funding, navigate the financial ecosystem, and drive sustainable climate adaptation initiatives.



Introduction: Sub-Modules / Sessions

Day 1: Adaptation Narrative Recap & Identifying Financing Opportunities for SMEs

Objective: SMEs recap and understand the main concepts and the learnings from the PrivABoo Modules. They understand the basic of different financial mechanisms and its implications, through concepts to practical examples.

OUTPUTS

Fundraising
Journey

Impact financing
ecosystem mapping

Gap Analysis

SMEs Action Plan

Day 2: Accessing Climate Finance Resources

Objective: SMEs will be equipped with the knowledge and tools to identify the right investors and financing instruments that match their business model, stage, needs, and goals, enabling them to access funding effectively, navigate the financial ecosystem, and advance sustainable climate adaptation initiatives.

Day 3: SMEs Action Plan

Objective: : SMEs will develop their 18-month growth plans by identifying how they can leverage PrivABoo to advance their next phase of development



Welcome to the PrivABoo Module on **Financing Opportunities for Adaptation SMEs**

Add Date



Implemented by:



Welcome & Opening

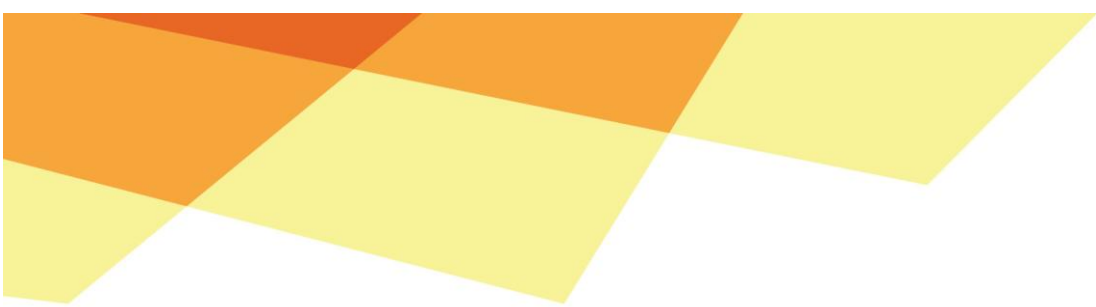


Module on Financing Opportunities for Adaptation SMEs & Program Closure

What do we want to achieve?

- Help you gain a better understanding of available funding sources and financing opportunities for Adaptation SMEs
- Support you in understanding how to find the right investor and funding instruments based on your business case, current status, needs and goals
- Provide you with the knowledge and tools SMEs need to access funding, navigate the financial ecosystem, and drive sustainable climate adaptation initiatives





Participants' introduction



Overview of Financing Opportunities for SMEs





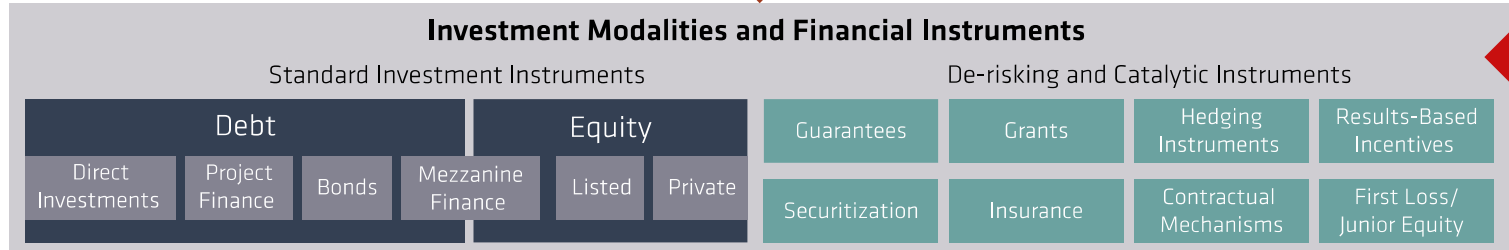
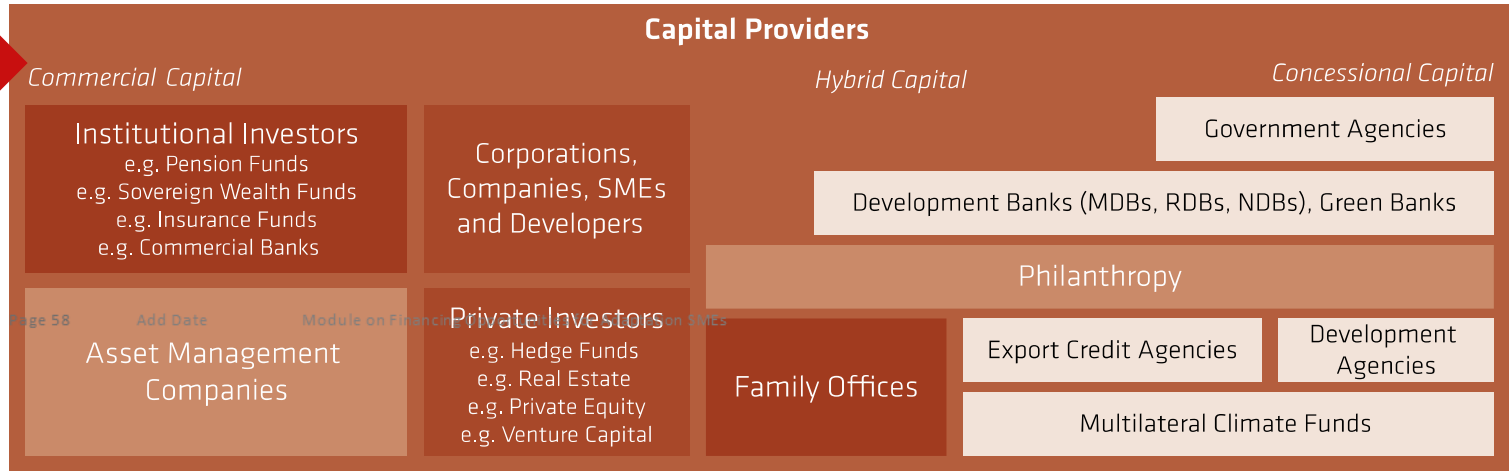
Purpose

Provide SMEs with an understanding of the different types of finance available, and guidance on how to select the right finance mechanism for their business

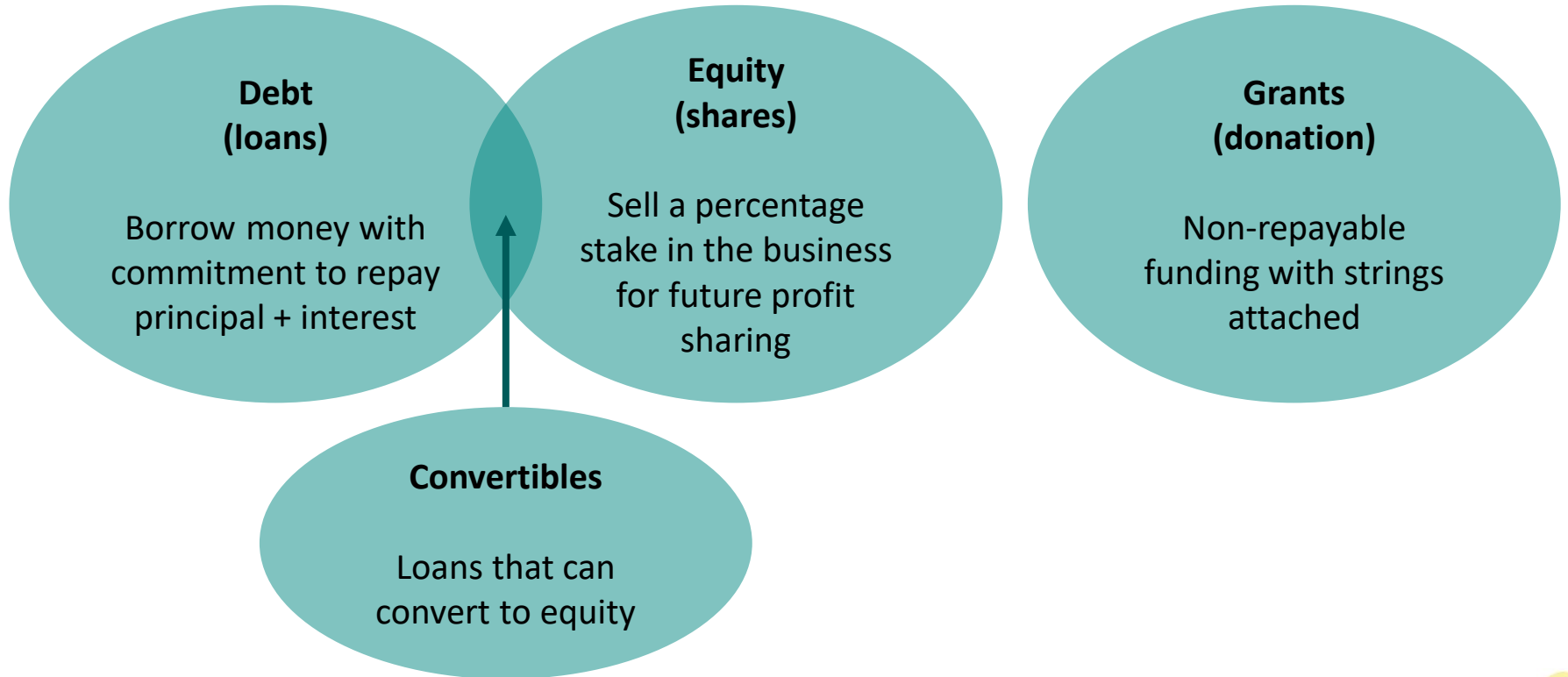
- What types of financing are available? What are the advantages and disadvantages of each?
- Who can provide these forms of financing?



Private Investments in Climate Action



Too Complicated? Let's simplify

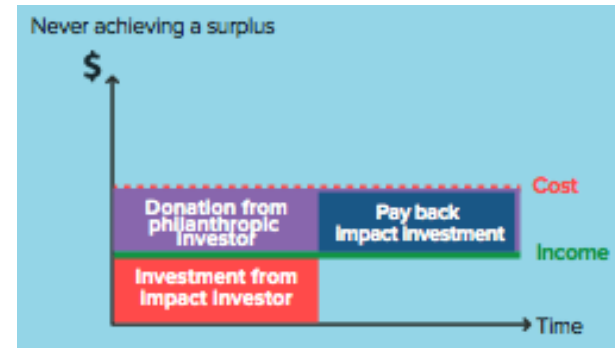
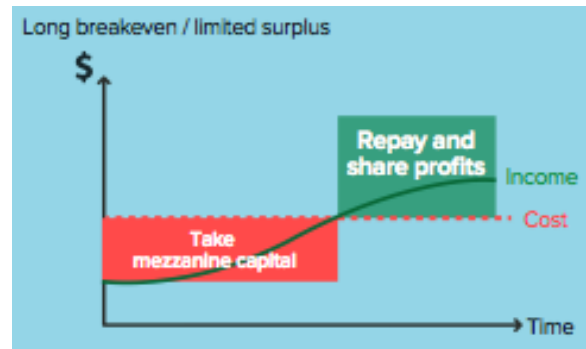
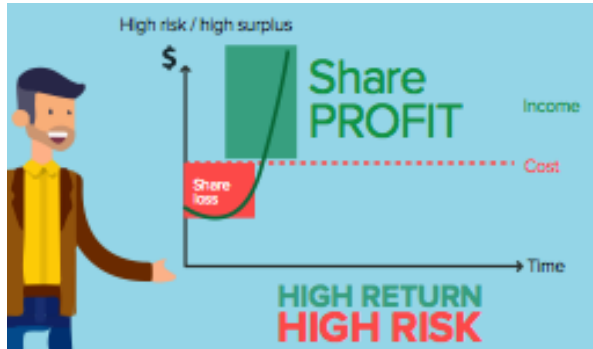
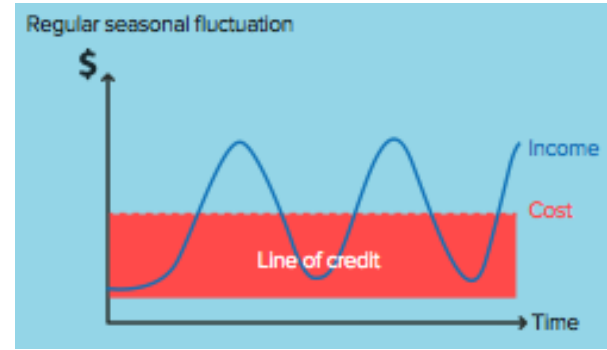
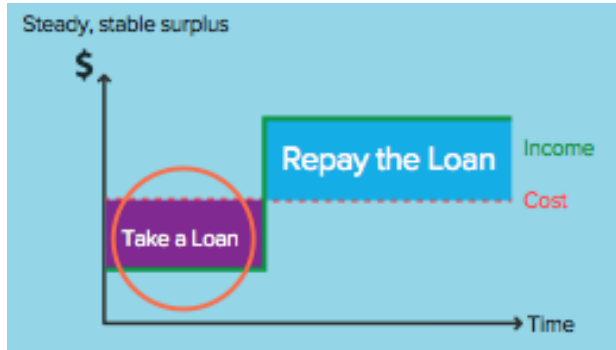


Funding, Finance or Investment?

	Equity	Debt	Grant
Ownership	Investor becomes part-owner – shared interest	No ownership; investor is a lender	No ownership
Return for Funder	% of profits, dividends, or sale of shares	Fixed interest	None
Repayment	No fixed schedule; exit via shares/dividends	Fixed repayment schedule	No repayment
Influence	Often has voting rights and board seat	None	Significant – creates bureaucracy
Risk	Shared risk with investor	High risk if unable to repay	Low financial risk
Use of Funds	Flexible	Often specific	Often restricted to project use
Application Process	Negotiation-based, moderate complexity	Can be complex, involves creditworthiness	Competitive, time-consuming
Best For	Scaling with strategic partners	Predictable cash flows and repayment ability	Early-stage, impact-driven or research-oriented activities
Advantages	Shared risk, access to expertise, no repayment obligation	No ownership dilution, clear repayment terms	“Free money”, no repayment, supports impact goals
Disadvantages	Dilutes ownership, potential loss of control	Requires regular repayment, may need collateral	Competitive, often time-consuming, restrictive usage



Considering the most appropriate options



Determining financing needs: investor requirements

Short term debt

- Cash flow
- Capital
- Collateral
- Credit history
- Conditions

Mid-to long term
debt

Equity

- Management & team
- Business model & growth expectations
- Risks



Debt instruments

	Definition	Finance Provider
Non-concessional loans	Loans that are provided at a market rate of interest for climate change activities	Commercial Banks
Concessional loans	Loans provided for the purpose of addressing climate change/sustainable objectives, characterized by longer repayment terms, lower interest rates and extended grace periods.	Governments, DFIs, Climate Funds
Convertible notes	A convertible note is a short-term debt instrument that converts into equity (shares) in a company at a later date, typically upon the occurrence of a specific event like a future funding round or an initial public offering	Often early-stage investors – angels or VCs
Thematic bonds (Green, blue, social), sustainability and sustainability-linked bonds)	Debt instruments where proceeds are used to finance or refinance, in part or in full, new and/or existing eligible projects/assets/companies that have climate and/or environmental and/or social and/or sustainable benefits	Public governments (national, sub-national or municipal) and private investors, banks or corporations



Equity Instruments

	Definition	Finance Provider
Equity securities	Ownership interest held by shareholders in an entity – a company (including SPV), partnership (including Joint Venture), or trust—realized in the form of shares of capital stock for the purpose of addressing climate change.	Public and private investors
Co-financing	Joint financing between two entities working to finance an activity with climate change objectives	Public and private investors
Crowdfunding	Funding climate change mitigation or adaptation project activities by raising small amounts of capital from many individuals, typically through an online platform.	Individuals
Equity securities	Ownership interest held by shareholders in an entity—a company (including SPV), partnership (including Joint Venture), or trust—realized in the form of shares of capital stock for the purpose of addressing climate change.	Public and private investors



Other Innovative Finance Opportunities

Are you thinking long-term and large-scale?

⇒ **Public-private partnerships**

Do you have an innovative project plan and are you looking for a partner who believes in your vision?

⇒ **Project finance**

Do you operate in a challenging market, and find it challenging to engage private investors who are too risk-averse?

⇒ **Blended finance**

Are you social innovators, committed to achieve results for society and environment?

⇒ **Result-based financing**

Can you offer environmental and social returns for a new generation of investors?

⇒ **Thematic bonds**

Are you facing challenges with working capital in your value chain?

⇒ **Agricultural value-chain finance**

Are you early stage, with a new and impactful proposition, that struggles to access conventional financial institutions?

⇒ **Crowdfunding**

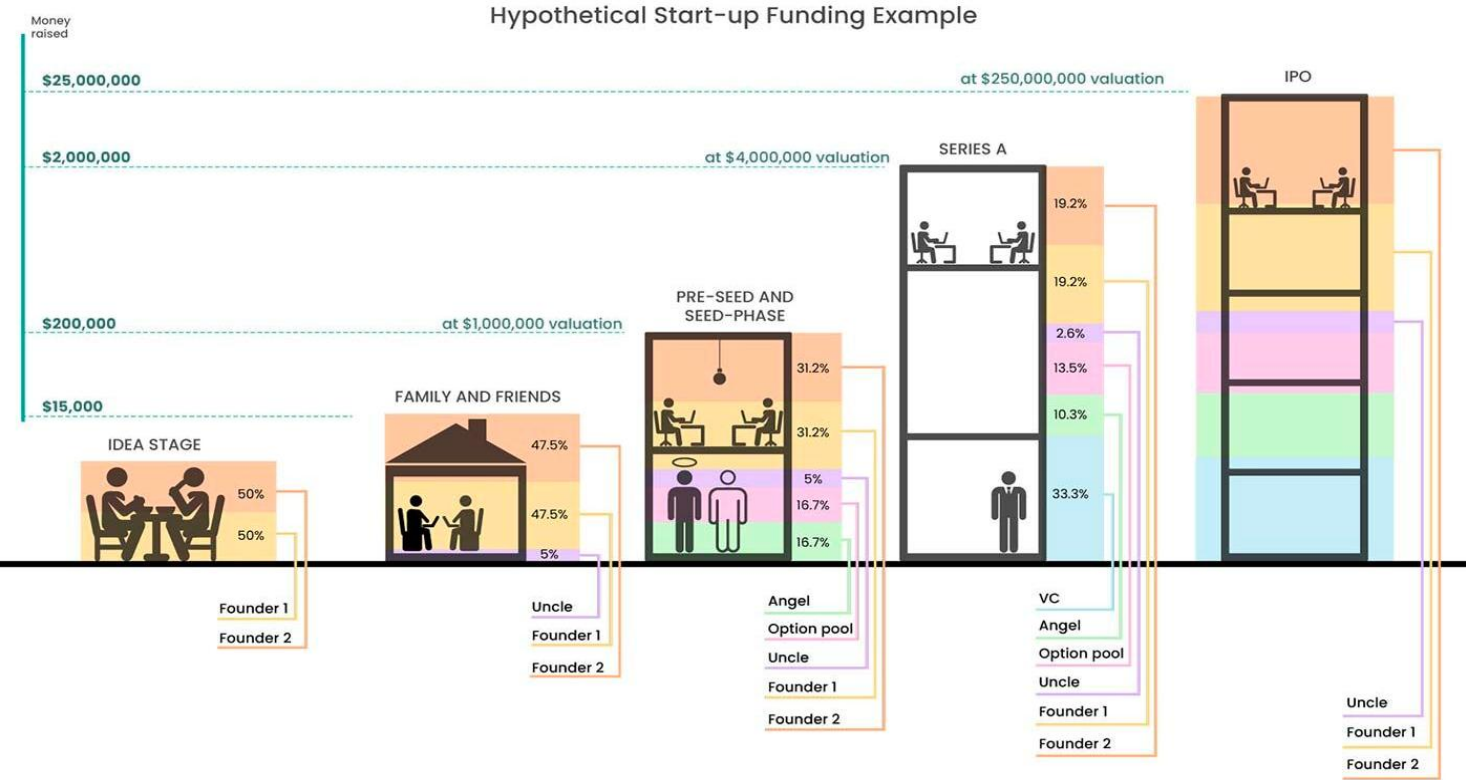
Is your investment need not too large (up to \$2m) and does your business model have a clear social or environmental impact?

⇒ **Impact Investment Funds**

Source: IBAN, Innovative Finance Opportunities for Inclusive Agri-Business



A Typical Funding Journey

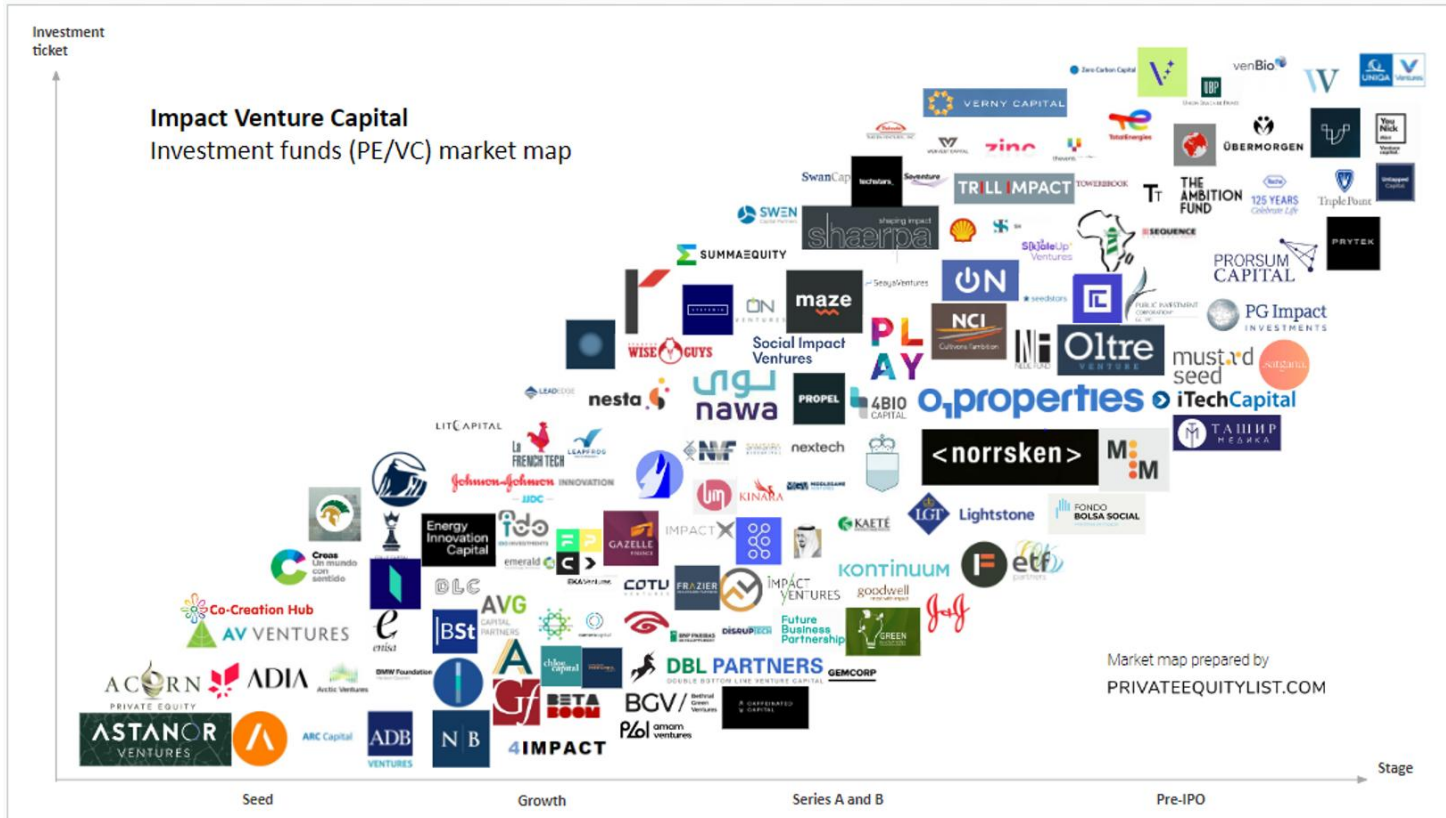


Types of Climate Investors

Investor Type	Description
Public Sources and Channels	Governments, multilateral, bilateral and national development financial institutions (DFIs), multilateral climate funds, state-owned financial institutions and state-owned enterprises.
Multilateral Sources and Channels	Multilateral development banks (MDBs), which may be global (for example, the World Bank Group) or regional (for example, African Development Bank) in focus, as well as other regional institutions and United Nations (UN) agencies
Climate Funds	Climate-specific funds, often multi-donor, set up and managed by national, bilateral, and multilateral organizations that usually provide trustee and administrative services.
Private Sector	Private equity firms, commercial banks, bond issuances, and other common and established sources of commercial finance
Angel Investors / Family Offices	Individual investors or family-based investors that invest smaller tickets in earlier stage, higher risk ventures with a relatively high rate of failure. Due to the high expectation of failure, however, these investors expect a correspondingly high return on investment for those projects that succeed.
Venture Capitalists / CVCs	Funds that invest in early-stage ventures, including Corporate VCs that often invest in line with their core business.



It's a jungle out there





Questions?





Plenary discussion

- What financing do you need in order to help scale your business?
- What types of financing instruments do you think would be most relevant to your business and why?
- Have you yet identified or spoken to any investors or financiers about your business, and how has this been received?



Fundraising Journey & Experience from SMEs



Each company **prepares a poster** to share their fundraising journey / experience.

1. ***If you already raised funds (excl. grants):***

1. State the amount of funding sought and from whom (investors, venture capital, crowdfunding, etc.)
2. How was the process and how long did it take?
3. What factors do you think were key elements for your successful fundraising?
4. Did you use the **Adaptation Narrative** to pitch your business?
5. What are dos and don'ts in approaching & communicating with investors?
6. Share the challenges you experienced during the fundraising process and the solutions you had to overcome. ***Reflect on the most important lessons learned from your fundraising experience.***

If you have not yet raised funds (equity, debt, other, excl. grants) / Gap Analysis :

1. Which initial steps did you prepare for the fundraising process (e.g. like market research, business plan development etc.)
2. What were the factors/reasons/gaps why a funding agreement did not materialize?
3. Detail the **main challenges** and obstacles encountered during the fundraising process: Consider **internal factors** (e.g., company readiness, team capabilities) and **external factors** (e.g., market conditions, investor sentiment).
4. **Investor feedback:** What feedback did you get? Were there some common themes or areas of concern raised by investors?
5. **Think about how to address the identified gaps for the future.**

2. Posters are presented in your **peer groups**. **Each group collects** the most important points on a **poster**

35 min



60 min





Peer groups presentations

60 mins



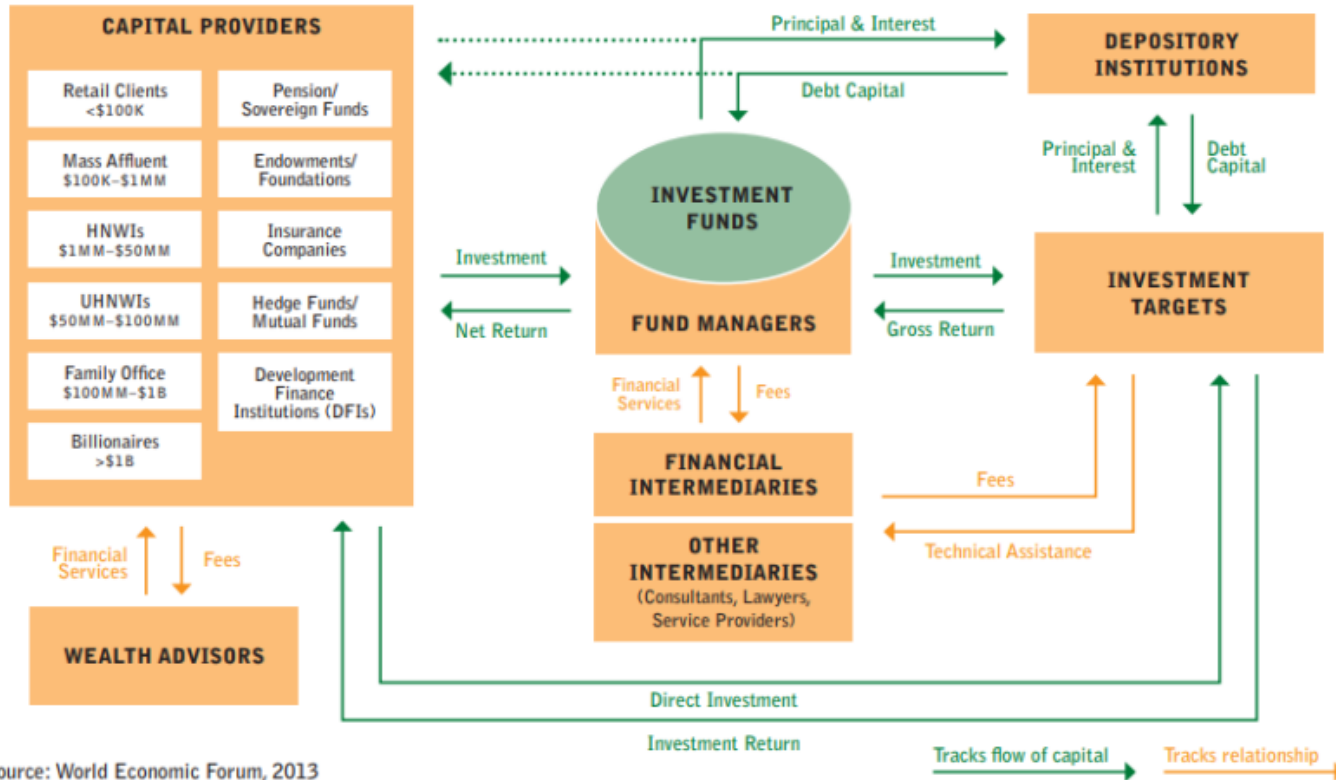


5th Session

Impact Investment for Adaptation SMEs



Understanding the broader impact investment landscape



Source: World Economic Forum, 2013



What do impact investors really want?



- ❑ **Real impact** – many of the investors interviewed identified a clear, demonstrable social and/or environmental impact as their primary concern



- ❑ **Track record** – impact investors seek businesses that have generated revenues demonstrating the product-market fit, and have an ongoing cashflow (often of 2-4 years) with a positive progression



- ❑ **Viable business plan** – the clear vision, strategy for growth and business plan should be feasible, clearly articulated and backed by the investment plan



- ❑ **The right team/leadership** – having a capable and motivated founder and/or management team that can implement the business strategy, but also be flexible and solve problems



- ❑ **Solid and realistic finances** – financial reporting should be properly managed, transparent and ideally audited, and forecasts need to be realistic and achievable



Also Good:

- Good governance and management control systems
- Demonstration of market size and potential
- A solid value proposition that is highly scalable
- An understanding and experience from the sector
- Ability to be adaptable, and manage and mitigate risks
- Clear articulation of how the investment would be used
- Potential for a good return on investment
- Financial literacy and an understanding of investment implications
- Ability for a future exit by the investor



Value expectations of impact investors

Climate change adaptation

- Water savings
- Drought tolerant crops

Climate change mitigation

- GHG emission reductions

Examples



Poverty alleviation

- Low income clients
- Job creation

Gender

- Women ownership
- Gender paygap

Religious values

- Christian founder & principles
- Adherence to Sharia law

Examples



How to find the right investor

Personal
networks /
referrals

Pitching and
networking
events

Accelerators
and
incubators

Active on
LinkedIn

Crowd
funding

Online
databases

...



Ensuring a good match – do your homework!



Country

Specific to
country or region



Sector

Climate or
specific sector



Finance

Equity, debt or
grants

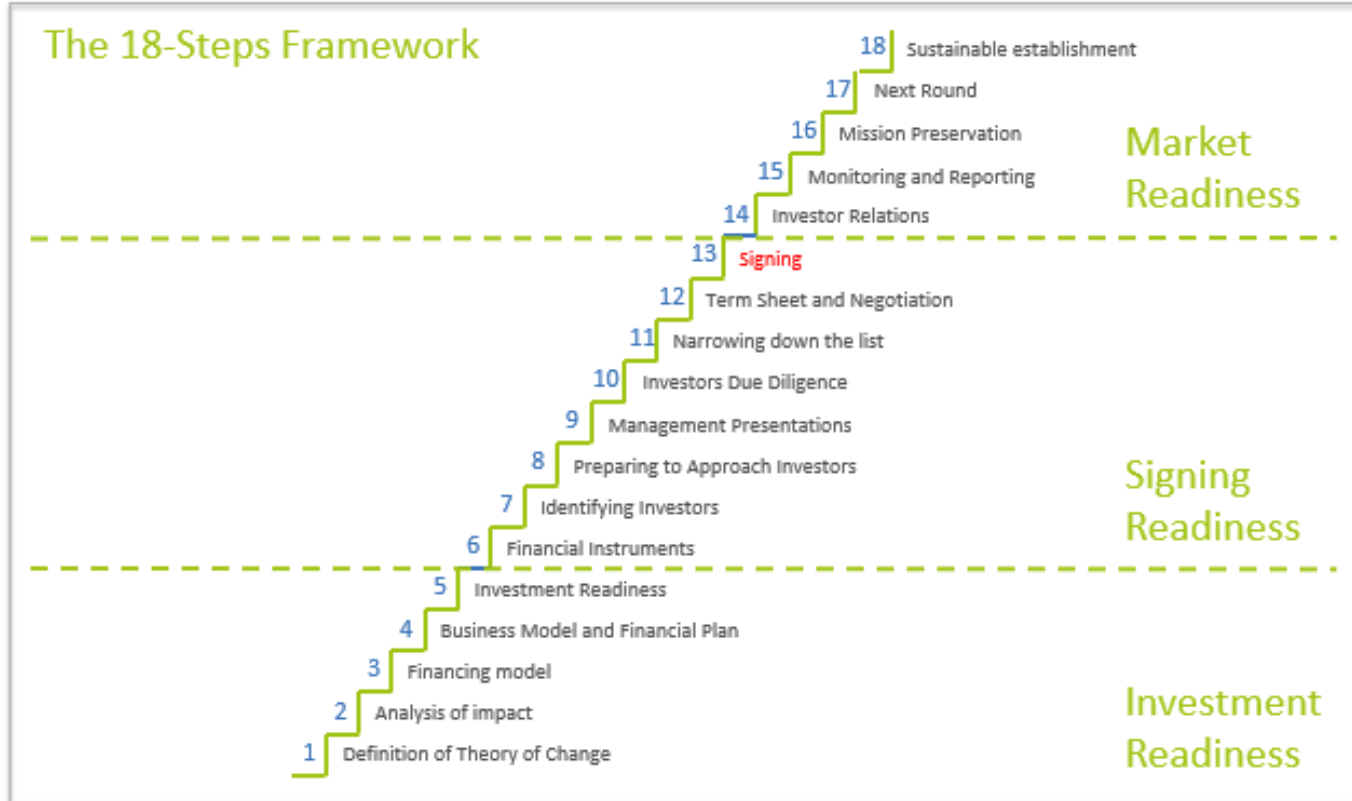


Stage

Pre-seed, seed,
Series A+



Navigating the investment process



Check if you are Ready

Inclusive Business CHECKLIST

Business Innovation Facility

Is your inclusive business investment-ready?

Many inclusive businesses seek external investment to finance their working capital or business growth. But some under-estimate just how 'ready' and robust they need to be to secure investment. This document provides an initial checklist of things to consider, to assess whether your business is ready to attract investment.

Investors will ask searching questions before committing funds to an inclusive business. Having a great business idea is simply not enough. To secure external investment, a business will usually need to address the terms below. If you can demonstrate that you have these in place, it may help you speed the process and achieve more success in attracting investors.

Commercial banks are often not equipped to provide finance to inclusive business. A new asset class, known as Impact Investment, has emerged in recent years. As Impact Investors seek a combination of social and financial return, they are often seen as a solution for inclusive businesses. But it is a mistake to believe they will be less rigorous than mainstream investors. Whoever the investor, stringent due diligence is to be expected.

Inclusive businesses will have to exhibit all of the features of a well-run investable company in order to secure the financial input that they need. They also need to be able to communicate the strengths of their business model to potential investors in a succinct and convincing manner.

The following Checklist outlines the criteria which an investor will apply and the elements that the business will need to have in place.

Structure: Investors will need evidence that you have a solid company structure in place.

Do you have the following?

- A well-defined commercial remit
- Shareholders agreement
- A stable board including experienced non-executive directors
- Management with a proven track record and necessary qualifications
- Undisputed share ownership
- Clear separation from any parent NGO or charities
- Industry-standard Memorandum and Articles of Association ensuring limited liability
- An organogram illustrating roles and responsibilities
- Details of protection relating to relevant intellectual property rights and patents
- A human resources plan and policies

Inclusive Business Checklists provide a quick and simple way to determine how effective an idea, tool or model might be for your inclusive business project. They can be used by inclusive business practitioners, to develop and scale up business strategies. They are based on the real-world experiences of companies actively expanding opportunities for people at the base of the economic pyramid through their core business activities.

Financials: Investors will require a full set of financial records.

Do you have the following?

- Audited accounts
- Verifiable record of paying taxes, licences etc
- A financial model – including projections for up to three years
- A strong cash flow
- Absence of debts
- Working capital
- Government grants
- Investment capital
- Adequate insurance cover

Market: You will need to show that you understand the market and your place in it.

Have you undertaken market analysis that covers the following?

- Market demand for products
- Pricing
- Competition
- Unique Selling Propositions
- Product development plan
- Details of strategic alliances or partnerships
- Distribution channels

Have you developed a sales and marketing strategy?

- Pricing strategy
- Distribution Channels
- Use of web, telesales and advertising
- Sales force

Triple Bottom Line: An impact investor will want clear evidence of the expected social impact of the inclusive business.

- Have you evaluated the social costs and benefits?
- Have you carried out an Environmental Impact Assessment?
- Do you have a system for tracking the impacts?

➔ For further information and to view other Checklists, go to: Practitioner Hub on Inclusive Business: www.businessinnovationfacility.org

The Business Innovation Facility (BIF) is a pilot project funded by the UK Department for International Development (DFID). It is managed for DFID by PricewaterhouseCoopers LLP in alliance with the International Business Leaders Forum and Accurate Development Partnerships. It works in collaboration with Intri Development, Imbilias, Renaissance Consultants Ltd, The Convention on Business Integrity and Challenges Consulting. The views presented in this publication are those of the author(s) and do not necessarily represent the views of BIF, its managers, funders or project partners and does not constitute professional advice. We welcome feedback on our publications – please contact us at enquiries@businessinnovationfacility.org

The "sell": You will need to provide evidence of a solid business plan.

Do you have the following?

- Sufficient size of deal to justify transaction costs (e.g. >\$250K)
- A professional-looking Business Plan
- A compelling pitch for investors (including a concise "elevator pitch" (the 30 second "sell" that would secure interest before the elevator doors open again))
- Risk analysis showing mitigating factors
- A Non-Disclosure Agreement
- Legally-compliant Information Memorandum
- Readiness to sell equity
- Exit Options (duration, terms etc) which will be considered realistic by investors

Additional Resources

Our Database of Financial and Technical Support for Inclusive Business provides a list of over 200 organisations that offer financial and/or technical support: <http://bit.ly/bif-support-database>

A helpful glossary of business terms can be found at: <http://articles.bplans.co.uk/business-term-glossary>

IMPACT INVESTING RESOURCES

Useful Websites:

Global Impact Investing Network www.thegiin.org
Asia Impact Investing Network www.asiainn.com
Monitor Institute www.monitorinstitute.com/impactinvesting
European Development Finance Institutions www.edfi.be

Relevant Reports:

UN Global Compact (2011), *A Framework for Action: Social Enterprise and Impact Investing* http://www.unglobalcompact.org/docs/issue_doc/development/Framework_Social_Enterprise_Impact_Investing.pdf
O'Donoghue, Nick et al (2010), *Impact Investments: An Emerging Asset Class*, JP Morgan's Social & Environmental Foundation <http://www.thegiin.org/cgi-bin/follow/resources/research/151.html>
Dalberg Global Development Advisors (2010), *Impact Investing in West Africa*, Dalberg, Copenhagen



Challenges Consulting

This Checklist was drafted by Kieran Archer of Challenges Consulting. It is based on work undertaken for "access to finance" projects supported by the Business Innovation Facility in Zambia and Bangladesh.

Challenges Consulting, which is part of the Challenges group (www.challengesworldwide.com), provides business consulting and mentoring for inclusive businesses in developing countries

Exercise: Quick checklist



Navigating Due Diligence

<p>"It's like getting married – be open and honest, don't hide or lie"</p>	<p>"Don't need to have all the answers, so ask for help where needed"</p>	<p>"Be prepared - have the team prepared knowing what is at stake"</p>	<p>"Be realistic about forecasts, risks and issues"</p>
<p>"Want ambition and optimism, but need to understand challenges"</p>	<p>"Focus on your track record rather than prizes and awards"</p>	<p>"Tailor your approach to your investor to align with their mandate"</p>	<p>"Get clarity on investment process, timelines and key decision points"</p>
<p>"Be as responsive as possible – investors don't like to chase"</p>	<p>"Don't overpromise, but do deliver on commitments"</p>	<p>"Share information early and be willing to overshare"</p>	<p>"Demonstrate a deep understanding of your business from end to end"</p>
<p>"It's a two-way street - take the opportunity to assess the potential investor"</p>	<p>"Be precise and clear on what you want"</p>	<p>"Ask questions and do not accept all kinds of offers that seems to good to be true"</p>	<p>"Chemistry is important – you need to like the investor too"</p>



Want to learn more – Social Finance Academy



▼ Social Problem



• Investment Readiness Check

Are you ready to approach investors?



Signing Readiness Check

Are you prepared to access investors, master the investment process and sign an investment contract?



Market Readiness Check

Are you ready to position your organization in the investment market?



Impact Readiness Check

Are you clear on the impact you want to create?

<https://social-finance-academy.org>



Tools and Resources



Tools and resources to help you find financing opportunities

SEED MSMEs Database

VC4A

Pay to use: Crunchbase

PrivABoo
Adaptation
Investor Database

- You've heard a lot about the different categories of financing mechanisms that exist in theory
- These tools and resources give an overview of what options and ongoing projects there really are
- Get started right away and **find the financing option that fits your SME**



1. SEED MSMEs Database

SEED, an initiative that was founded by UN Environment, UNDP, and IUCN, developed this **informative database for sustainable MSMEs**. It provides basic and easily accessible information about funding opportunities and can be accessed [here](#).

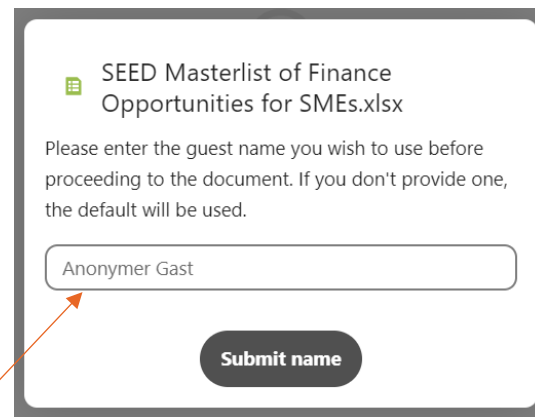
Financial and non-financial support opportunities for eco-inclusive MSMEs

This is a database including financial and non-financial support opportunities for eco-inclusive MSMEs around the world.

[MSMEs Database](#)

Disclaimer

Please note that SEED only acts as a source of information and further details about these opportunities can be found in the respective websites. Grants might be time restricted and not run through the whole year.



SEED Masterlist of Finance Opportunities for SMEs.xlsx

Please enter the guest name you wish to use before proceeding to the document. If you don't provide one, the default will be used.

Submit name

When you click on the link to the database, you will have to enter a guest name to proceed. However this name can be „anonymous“ as well, it does not matter for the use of the tool



1. SEED MSMEs Database

After accessing the database you can use different **filters** to get a better overview of the information that is relevant for you, for example, filter by **region** („Global“, „Africa“, „Sub-Saharan Africa“) or the **type of financial support** that you are looking for („funding“, „grants“, „investment“, „pro bono“, etc.)

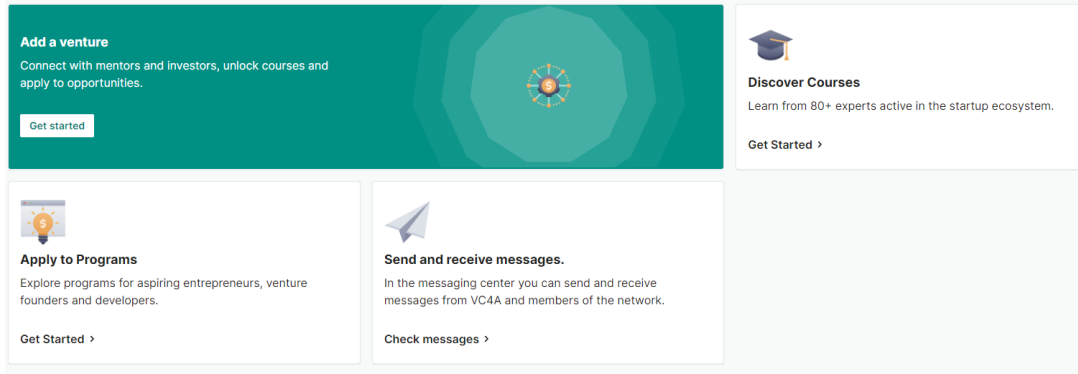
SEED Promoting Entrepreneurship for Sustainable Development Financial and non-financial support opportunities for eco-inclusive SMEs								
Name of Opportunity	Opportunity Description	Financial Support	Non-Financial Support	Ticket Size (financing amount - USD)	Target Sector(s) *	Target Region	Target Countries	Website
ARAN	Angel Investor Network - The African Business Angel Network (ARAN) is a Pan-African non-profit association. ARAN was founded in early 2015 to support the development of early stage investor networks across the continent and to grow the cohort of early stage investors needed to drive the growth of SMEs in Africa.	Investment, capacity building		n/a	Multisector	Africa		https://abanangels.org/
AECF	Impact Fund - The AECF is a development institution which supports businesses to innovate, create jobs, leverage investments and markets in an effort to create resilience and sustainable incomes in rural and marginalized communities in Africa.	Investment (grants, loans)		100.001 - above	Clean Energy, Multisector	Sub-Saharan Africa	Sub-Saharan Africa	https://www.aecfrica.org/index.php/
AfDB	Multilateral Development Bank (MDB) - The overarching objective of the African Development Bank (AfDB) Group is to spur sustainable economic development and social progress in its regional member countries (EMCs), thus contributing to poverty reduction. The Bank Group achieves this objective by mobilizing and allocating resources for investment in EMCs, and providing policy advice and technical assistance to support development efforts.	Private Sector Development projects		n/a	Multisector	Africa		https://www.afdb.org/en/topics-and-sectors/sectors/private-sector/
Africa Eats	Impact Investor	Investment, accelerator programme		100.001 - above	Water, Sanitation and Health	Africa		http://africaeats.com/
Africa Enterprise Challenge Fund (AECF)	Impact Investor - The Africa Enterprise Challenge Fund (AECF) is a \$250m challenge fund that awards grants and repayable grants to private sector companies.	Investment, advisory services		100.001 - above	Sustainable Agriculture, Clean Energy	Africa		https://www.aecf-africa.org/
African Women Development Fund Grants for Women in Africa and Middle East	Under this initiative, AWDF aims to scale up its mentoring and advisory services to promote women's rights, amplify their voices, increase economic opportunities and improve access to spaces of decision-making.	Grants		100.001 - above	Other	Africa and Middle East		https://awdf.org/
Arbore Fund	Fund - The fund invests in sustainable forestry projects in Latin America, the Caribbean, and Sub-Saharan Africa in countries where biophysical growth conditions for forests are ideal.	Investment	Tailored technical training	Various	Biodiversity	Latin America, the Caribbean, sub-Saharan Africa		https://www.arbore-advisors.com/arbore-fund/

You get a basic Excel table as a result. From there you can go to the websites which are relevant for your SME.



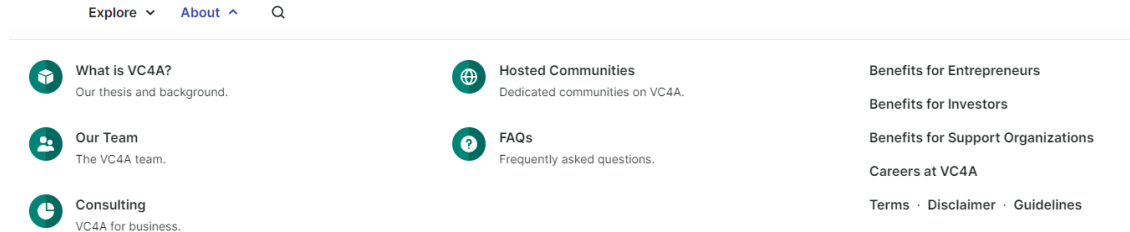
2. Venture Capital for Africa (VC4A)

VC4A is an online platform offering **resources**, **mentorship**, and **access to investors** for African startups. The website offers benefits for investors as well as for entrepreneurs. You can access the website and explore [here](#).



1. You have to **create an account** to access your **Dashboard**. There you can also **add your business** and all the information you want to share with other entrepreneurs and possible investors.


2. From your **Dashboard**, go to **About** and to **Benefits for Entrepreneurs** to see an overview of the different option that the website offers for business owners.



2. Venture Capital for Africa (VC4A)

You can find the different options the website offers for your SMEs directly [here](#). Fundraising options are available after you register and describe your business. There are no set investment conditions, so it is up to you what terms and conditions you agree on with possible investors.


Why join VC4A?



Be discovered

Create a visually appealing venture profile.


[Less -](#)



Promote fundraising rounds

Announce your new fundraising round.


[More +](#)




Get access to opportunities

Gain access to our partner network.


[More +](#)




Create an appealing profile that captures the attention of prospective investors and partners.



Get featured on our homepage, social media channels, or in our next newsletter.




Grow a dedicated following by engaging members on your VC4A startup profile.



Academy

Join the VC4A Startup Academy.


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Connect to mentors

Meet international business experts.

[More +](#)



Proven track record

Fundraising rounds are opened weekly.

[More +](#)



The Africa Prize for Engineering Innovation

Accelerating business growth for African engineering start ups



The Africa Prize for Engineering Innovation, founded by the Royal Academy of Engineering, is Africa's biggest prize dedicated to engineering innovation. The Prize awards commercialisation support to African innovators developing scalable engineering solutions to local challenges. These innovations show the importance of engineering in improving quality of life and economic development.

\$50,000 Post-Harvest Loss Innovation Prize

FACTOR Seeking groundbreaking solutions that empower smallholder farmers



We are seeking groundbreaking solutions that empower smallholder farmers in South Asia and Sub-Saharan Africa to reduce post-harvest loss.

Overview

Application Deadline: Aug 14, 2024
 Contact: submissions@factore.com
 Apply: [Application form](#)
 Nominate: [Nomination form](#)

The website also features a variety of different programs that you can apply to. There are some features for which you need a subscription plan, but most of the tools are free for entrepreneurs.



3. Crunchbase

There are some tools that are not free of charge, but might be useful for you. Question: Has anyone here ever used **Crunchbase**? The app allows you to **find investors**, **get funding**, and to **check your competition**. Go to the website [here](#).

Search Investors Try AI Se

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[Acquisitions](#)
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[Hubs](#)

Filters CLEAR (1) < PREV 1-50 NEXT > of 714 results

<input type="checkbox"/>	Organization/Person Name	Number of Investments	Number of Exits	Location
<input type="checkbox"/>	LoftyInc Capital	109		
<input type="checkbox"/>	SpeedUPAfrica	89		
<input type="checkbox"/>	Co-Creation Hub Nigeria	56		
<input type="checkbox"/>	Ingressive Capital	49		
<input type="checkbox"/>	EchoVC Partners	49		

Investor Type
Venture Capital

Investment Stage
Early Stage Venture, Seed, Venture

Number of Exits
3

Contact Email
investor.relations@loftyincltd.biz

Phone Number
831-238-7997

Over the last decade, LoftyInc Capital has invested over \$25m into over 150 of Africa's fastest growing enterprises, including three unicorns, and attracted c.USD1.5b in follow-on funding into our portfolio companies. With an overall goal to prioritize long-term growth and sustained benefits to communities, we have also built an extensive ecosystem...

▼ READ MORE

[in](#) [t](#)

You can look for investors, companies and people, get information about them and contact the investors relevant to you.



3. Crunchbase



Clara-Sophie Baschant

My Crunchbase

My Recommendations

My Lists

My Saved Searches

Import Lists

Shared Tags

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Search Companies


Search Contacts

Discover Hubs

Find Investors

Create Profile

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Viewing Activity From: My First List





This Week on Crunchbase

Based on your territory

686	\$33B
FUNDING ROUNDS	TOTAL FUNDINGS
196	\$17.5B
ACQUISITIONS RECORDED	ACQUISITIONS AMOUNT

[EDIT TERRITORY](#)

Recently Viewed

-  LoftyInc Capital
-  CORE POWER (UK) Ltd

[VIEW ALL >](#)

You have your own **Dashboard** where you can use various kinds of features. You'll also get **recommendations** for companies and investors, and see your Recently Viewed.

They provide special subscription plans for enterprises and there is a **7 day trial** if you want to check it out. Just make sure to cancel your subscription in time if the tool isn't for you.

Choose the Right Crunchbase Solution for You

Pro		Enterprise
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\$99	\$49	Contact Us
/ user / month billed monthly	/ user / month billed annually	Custom billing
Best for individuals who want a flexible plan to complete a short-term project	Best for individuals who need repeated success against ongoing goals	Best for large teams who need scalable integrations and API add-ons
TRY PRO FREE	TRY PRO FREE	TALK TO SALES

Similar logic:  **AngelList**



Mapping the Climate Investment Landscape



Interactive exercise – Navigating the impact investment landscape

For your country, are there important actors that are missing?

- Write them on paper and add them to the board

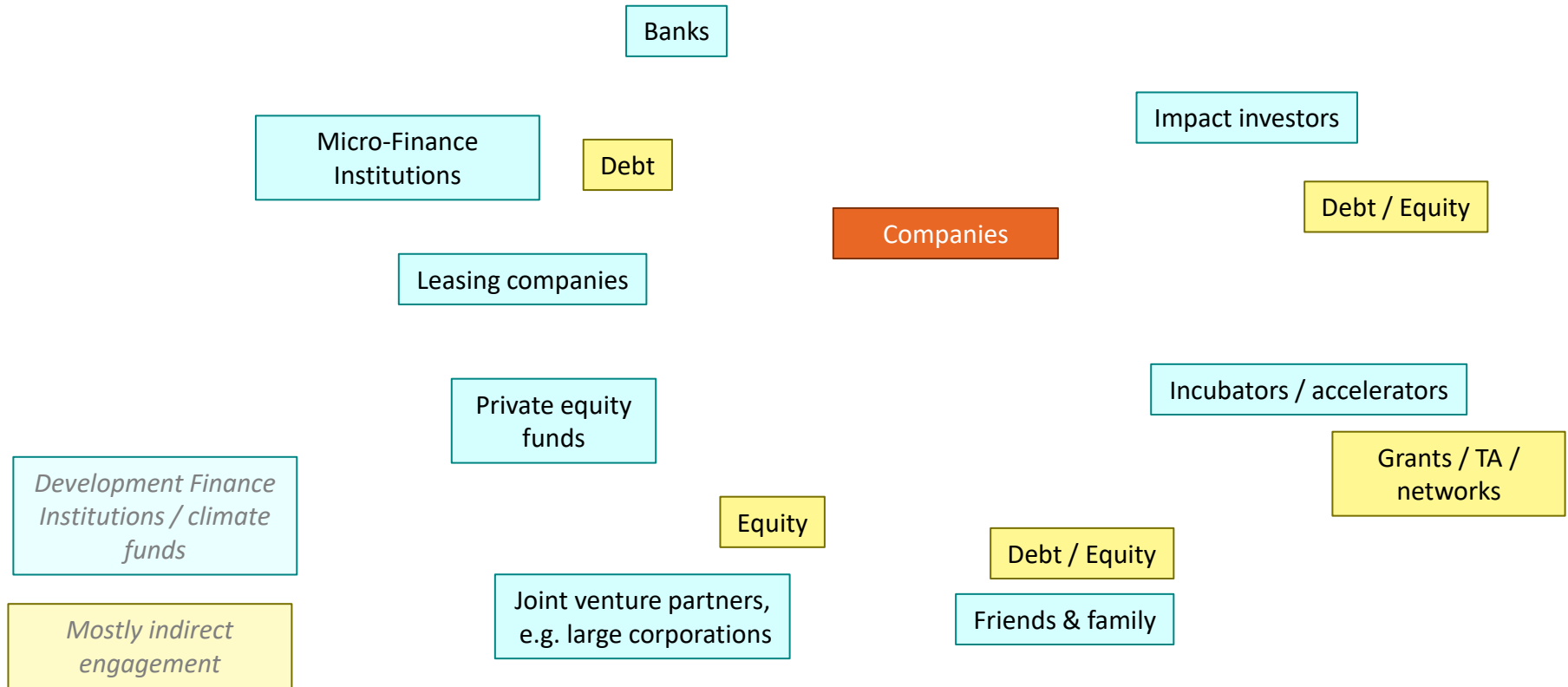
Which of these actors are important for the financing needs of your business?

- Place a green sticker on actors who are important and whom you are already connected to
- Place a yellow sticker on actors who are important and whom you know how to connect with
- Place a red sticker on actors who are important, but you don't know how to approach them

Discussion of results for each country



The (impact) investment landscape in Add Country



Develop an Action Plan for the next 18 months



SMEs develop their plans for the next 18 months.

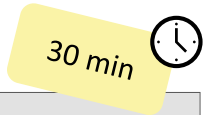
1. Exercise introduction

How do you intend to leverage **PrivABoo knowledge** for the next phase of your business? For training? perhaps building sustainable partnerships for growth? addressing challenges specific to climate adaptation businesses or climate adaptation financing, fundraising?

2. Create a poster using your Company Action Plan to describe your next steps towards:

- ✓ **PrivABoo** Alumni initiative.
- ✓ Covering gaps in term of investment readiness
- ✓ Pursuing **funding** opportunities
- ✓ applying **a gender lens** in your business operations
- ✓ Increase the **adaptation relevance, narrative and impact of your business**;
- ✓ Increase your capacities for **measuring adaptation impacts**;
- ✓ Increase your capacities for strategic **communication of your adaptation relevance and impact**.

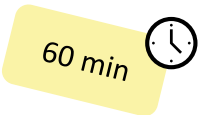
3. Posters are presented in your peer groups.



Action Plan

Objective 1			
Internal / GIZ / SME Group			
Actions / Tasks / Steps	Resources needed	Success Indicator or Milestone	Progress of Implementation
1			
2			
3			
4			

Objective 2			
Actions / Tasks / Steps	Resources needed	Success Indicator or Milestone	Progress of Implementation
1			
2			
3			
4			



Closing and Wrap-up Plenary session





Plenary discussion

- What are the personal key learnings/findings from the workshops?
- What have you learned from your peer SMEs?
- How could the development of a climate adaptation narrative impact your business?

If you could start the PrivABoo over from the beginning ...

- What would you do differently?
- What would you want to be different about the program?





Feedback session

Your feedback

- ... is anonymous.

- ... helps us better prepare and structure our next events and workshops.



**Deutsche Gesellschaft für
Internationale Zusammenarbeit (GIZ) GmbH**

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I www.giz.de

On behalf of Federal Ministry for Economic
Cooperation and Development (BMZ)



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