Landscape of Technical Assistance to Agri-SMEs

Sub-Saharan Africa and Latin America and the Caribbean

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CLIC

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ABOUT CPI & CLIC

Climate Policy Initiative (CPI) is an analysis and advisory organization with deep expertise in finance and policy. Our mission is to help governments, businesses, and financial institutions drive economic growth while addressing climate change. CPI has seven offices around the world in Brazil, India, Indonesia, South Africa, the UK, and the US. The ClimateShot Investor Coalition (CLIC) is a global coalition working to accelerate and scale finance for low-carbon, climate-resilient, and nature-positive agriculture and food systems globally. CPI is the Secretariat of CLIC.

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EXECUTIVE SUMMARY

Technical assistance (TA) is a key tool for preparing agricultural small- and medium-sized enterprises (agri-SMEs) to access climate finance, yet the ecosystem of providers delivering this support remains largely unmapped. TA aims to help agri-SMEs bridge their finance gaps by building the operational and financial capabilities investors require, while embedding climate-resilient and nature-positive practices. SMEs receiving TA attached to investment show 44% higher revenue growth than the ones receiving financing alone (Shell Foundation & Omidyar Network 2019), and 27% of blended finance transactions in agriculture include TA components (Convergence 2024).

Despite significant investment in TA and the presence of hundreds of providers across emerging markets, the ecosystem remains fragmented and difficult to navigate. Impact investors report difficulty finding investment-ready opportunities, while agri-SMEs struggle to identify support matching their specific needs and development stages. There is a lack of coordination infrastructure, leading to information opacity.

Official Development Assistance (ODA) cuts are shrinking the grant funding available for TA, pushing funders toward more targeted support and forcing TA providers to require SMEs to co-finance their own TA. As funding becomes scarcer, some TA providers need to adopt fee-based structures to enhance financial sustainability, risking the exclusion of early-stage SMEs precisely at the stages where support gaps are most acute. Understanding who provides which services, and where, helps funders identify duplication or critical gaps in their portfolios.

This report maps over 200 organizations in the TA ecosystem across sub-Saharan Africa (SSA) and Latin America and the Caribbean (LAC) to increase visibility of how the ecosystem operates and to inform actions that can improve its effectiveness. The research leverages expertise from the TA program of the ClimateShot Investor Coalition (CLIC)—the Agrifood Investment Connector (The Connector)— and 13 expert interviews. After mapping providers by geographic focus, support type, and organization type, this work provides a deeper analysis of 30 climate-focused TA organizations, selected against criteria including Connector mandate fit, strategic learning value, climate-gender-nature focus, and public information depth.

The mapping is based on publicly available information without direct verification with providers, and we do not claim to have an exhaustive landscape of providers. The limitations of our mapping exercise are discussed in the report, and echo some of the challenges faced by the sector. The users should treat this as a starting point for further investigation rather than a definitive directory. TA provided in corporate supply chains has been excluded from the scope, as there is minimal publicly available information on their practices.

KEY FINDINGS

Our analysis identifies four reinforcing structural gaps that weaken the TA ecosystem for agri-SMEs: lack of transparent information, pre-investment funding, standardization, and collaboration incentives. Information opacity sits upstream of the others: it prevents efficient allocation of existing funding, weakens opportunities for coordination, and makes each of the other constraints harder to address. This means donors need to fund the enabling environment, not just individual programs, to ensure TA's effectiveness.

MAPPING FINDINGS

Our analysis of 207 TA organizations found that TA landscapes in SSA and LAC differ in structure and concentration. Our mapping surfaced clear differences in how the SSA and LAC landscapes are structured. In SSA, Kenya dominates with 104 organizations (over 60% of the regional total), creating deep ecosystem density in a single hub, with significant gaps elsewhere in the region. The LAC landscape is more distributed: Colombia and Peru each host 61 organizations, and Mexico hosts 50.

Across both the SSA and LAC regions, least developed countries and small island developing states (SIDS) are the most underserved. For example, the mapping found fewer than 20 providers that serve Guinea-Bissau and Eritrea, and fewer than 10 for several Caribbean SIDS. Further analysis is merited to explore whether TA concentration reflects market size or demand.

Local TA providers are difficult to map systematically and appear underrepresented despite their important role. Interviewees consistently reported that domestic TA organizations are among the most effective providers in the ecosystem. Yet, we identified only 12 across SSA and 3 in LAC, representing just 8% of our dataset. This partly reflects the broad scope of the research and potentially the limited online presence of local players.

Service positioning trends toward comprehensive rather than specialized offerings. Over two-thirds (68%) of mapped TA organizations describe comprehensive packages combining business support, inclusive models, and value chain development. Whether actual delivery capacity matches these claims is difficult to gauge from public information. Verifying this would require qualitative analysis of TA providers and their recipients, which was beyond the scope of this study.

Climate and gender integration is standard across the ecosystem, but nature integration lags. Of the 30 climate-focused organizations we examined in depth, 28 discuss integrating gender equality into SME strategy or program design, and often include dedicated women-focused initiatives. However, only 10 explicitly reference integrating nature considerations such as biodiversity protection, agroecology, or regenerative agriculture, in the way that CLIC's agrifood technical assistance facility does. This presents an important area for building agri-SME expertise, as investor expectations around nature-positive outcomes grow.

LESSONS LEARNT FROM OUR ANALYSIS AND INTERVIEWS

The primary market failure is not a lack of accessible TA support, but constrained visibility into the full TA provider ecosystem. Agri-SMEs cannot systematically identify which organizations meet their needs, instead relying on word of mouth. Funders lack visibility into the landscape when making allocation decisions, risking duplication in hub markets while leaving critical gaps in frontier markets, and concentration in certain TA areas while specialized support (e.g., on climate-nature impact assessment) remains scarce. TA providers themselves cannot easily identify complementary organizations beyond their immediate networks.

A post-investment bias persists across delivery models, creating a pre-investment funding gap. Post-investment TA can be built into fund management fees, creating a sustainable revenue model. Pre-investment TA requires convincing donors to fund support without guaranteed investment outcomes, and the absence of viable funding models at this stage contributes to a bottleneck in the pipeline.

Measurement needs and delivery objectives pull in opposite directions. Aggregating impact across the TA ecosystem requires common metrics and frameworks, yet effective support must be tailored to context. Agri-SMEs undertake multiple incompatible climate assessments for different funders, wasting limited resources. At the same time, standardized frameworks designed for one sector or geography often fail to fit the diversity of agricultural enterprises across varied contexts.

TA providers compete for the same donor funding rather than coordinating, because their contracts reward the number of clients served rather than ecosystem outcomes. Short funding cycles, competition for the same donor funding pool, and a lack of incentives to share information limit coordination and knowledge dissemination. The result is duplicated demands on SMEs and slower learning across the ecosystem.

The report presents four case studies that illustrate how these dynamics play out and where workable responses already exist:

1. **Prospero's nationwide TA operations in Zambia** demonstrate the kind of locally rooted provision that the few existing international mapping exercises routinely miss.
2. **The experience of IDH FarmFit Fund and the standalone reVive Hub TA facility in Colombia** illustrates why pre-investment TA struggles within standard fund timelines, and how a dedicated facility with a longer runway and lower conversion expectations can partly close the gap.
3. **The IDH-Cerise+SPTF Agri Client Protection Tool** highlights an underused role for TA funding: building sector-level public goods that benefit all providers and investors.
4. **The Smallholder SustaiNability Upscaling Programme (SSNUP)** shows that coordination does not require providers to change their competitive behavior. It requires a trusted intermediary, sustained funding, and investors willing to apply the same due diligence to TA that they already apply to capital.

These four case studies are deliberate, subjective choices: examples of what we believe success looks like in this context, not a ranking or a definitive set of solutions.

SOLUTIONS TO STRENGTHEN THE ECOSYSTEM

The table below summarizes four areas for action aligned with the key lessons learned and provides specific opportunities for public- and private-sector actors.

Action area	Challenge addressed	Public and donor action	TA provider and investor action
Establish independent brokering and coordination infrastructure	Fragmented ecosystem with limited coordination mechanisms between competing providers	▪ Fund and designate a trusted neutral body (e.g., an NGO or dedicated coordination program) to verify overlap, facilitate referrals and manage coordination without requiring providers to share competitive intelligence directly, based on the model of the Smallholder SustaiNability Upscaling Programme (SSNUP)	**TA Providers:** participate in coordinated structures; share project-level information with trusted intermediaries; adopt compatible frameworks that allow for program-specific requirements **Investors:** request visibility into TA coverage for target SMEs before committing capital
Build shared digital infrastructure while preserving local flexibility	Duplication of effort across providers; SMEs cycling through similar programs; no shared visibility of who is served where	▪ Fund shared databases tracking which SMEs receive what support; invest in technology platforms with sustainable funding beyond initial grants; coordinate reporting timelines ▪ Demand that TA providers adopt compatible climate and nature impact frameworks to reduce SME reporting burden across programs	**Investors:** accept compatible frameworks in due diligence rather than requiring bespoke submissions
Address the pre-investment funding gap through dedicated facilities	Post-investment bias across delivery models; promising SMEs filtered out before reaching scale	▪ Fund standalone pre-investment facilities (e.g., the IDH reVive Hub model) with longer timelines and explicit mandates to build a pipeline without guaranteed investment outcomes	**Providers:** build matchmaking infrastructure connecting TA-supported SMEs to appropriate investors. Experiment with milestone-based TA-plus-grant combinations (e.g. USAID-WFP model) that tie funding to SME progress **Investors:** advocate for "preparation capital" carved from main funds
Prioritize national provider visibility and invest in frontier market development	Underrepresentation of national providers; geographic concentration in hub markets; absence of investment vehicles in frontier markets	▪ Fund country-level TA ecosystem mapping (e.g., through chambers of commerce, industry associations, or equivalent local institutions) ▪ Provide 3–5-year funding commitments with budget flexibility to deploy local partners as primary delivery vehicles	**Providers:** partner directly with national providers **Investors:** pair frontier-market scouting with assessment of investment ecosystem maturity; adjust ticket size expectations accordingly

CONTENTS

INTRODUCTION

Agricultural small and medium-sized enterprises (agri-SMEs) produce over one-third of the world's food yet face severe climate impacts. In South Asia and sub-Saharan Africa (SSA), SMEs dominate agrifood supply chains, channeling 65% of food (Reardon et al. 2021, 2019; Daly et al. 2023). In many Latin America and the Caribbean (LAC) countries, agrifood systems account for a quarter of national GDP (World Bank 2025). Small-scale producers and the agri-SMEs serving them face the most severe climate impacts but have limited capacity to manage them.

Yet, agri-SMEs in emerging markets and developing economies (EMDEs) face a yearly USD 106 billion finance gap, a critical challenge (ISF Advisors 2022). Agri-SMEs typically seek financing rounds of USD 50,000 to USD 2 million, making these "missing middle" enterprises too large for microfinance institutions and too small for commercial banks (ISF advisors 2022; Collaborative for Frontier Finance 2018). Global capital markets held USD 9.3 trillion in new bond issuances in 2024 (S&P Global 2025), and commercial financial institutions—key players of agri-finance—provided USD 460 billion of climate finance in 2023 (CPI 2026). Yet, this capital cannot reach agribusinesses in the missing middle due to barriers such as investment readiness, high transaction costs, small ticket sizes, and price volatility. The gap extends beyond SSA, with agri-SMEs across EMDEs struggling to access finance.

The gap exists due to insufficient investment-ready agribusinesses and inappropriate lending mechanisms, which could support agribusinesses (CASA 2020). On the demand side, SMEs lack the financial management systems, governance structures, and impact measurement capabilities investors require, often coming with higher levels of risk that investors are willing to tolerate (see Table A1.2 for analysis of common gaps). On the supply side, investment products are commonly structured inappropriately for the targeted agribusinesses; for instance, they are often focused on short-term working capital (CPI 2026). This research focuses on the supply-side constraint: how technical assistance helps SMEs develop the capabilities required to attract investment.

Technical assistance (TA) can help bridge this readiness gap by improving agri-SME business operations in a way that de-risks investments. Across sectors, SME funds providing TA achieved 44% greater revenue growth and higher average IRRs compared to those without support, particularly where maximizing development outcomes is a fund's primary objective (Shell Foundation & Omidyar Network 2019). In the agriculture sector specifically, 27% of blended finance transactions globally include a TA component, one of the highest rates alongside energy and financial services (Convergence 2024). TA can help catalyze the availability of financing by reducing risk and developing the pipeline (Convergence 2023). Investment readiness programs such as B-Briddhi in Bangladesh have demonstrated that preparing enterprises for funding can lower due diligence costs for investors and increase market confidence (LightCastle Partners 2025), while funds like Kampani explicitly pair investment capital with TA facilities to manage portfolio risk in the agri-SME missing middle.

Despite the momentum behind tailored TA for SMEs, realized pipeline improvements are not proportional to the level of investment in these services. Millions have been invested in TA, with hundreds of providers now operating across EMDEs. An FAO study identified 150 entrepreneur support organizations (ESOs) in Africa for agrifood systems, and over 350 across sectors (FAO 2023), and CABI's database listed 110 TA providers mainly active in Africa (CABI 2023). Yet, impact

investors report struggling to find adequately prepared investment opportunities despite actively seeking agri-SME exposure. Agri-SMEs report difficulty navigating the TA landscape to access support matching their specific needs and development stage.

Resource constraints are changing how technical assistance is provided and how the sector operates. Official Development Assistance (ODA) cuts are forcing funders to deliver more targeted support precisely when climate change intensifies the requirements SMEs must meet to attract investment. Alignment of actors around shared priorities to reduce duplication and improve efficiency in the TA ecosystem, while maintaining TA programs around key areas, is therefore increasingly urgent. The Climate Finance Accelerator, funded by DESNZ, announced the launch of a second cohort, while GIZ is not expected to renew the adaptation-focused investment facilitation platform Privaboo. Understanding who provides which services, and where, helps funders identify duplication or critical gaps in their portfolios.

This report maps over 200 TA organizations across LAC and SSA, alongside a deeper analysis of 30 leading climate-focused TA for agri-SMEs. TA organizations encapsulate both providers of TA services working directly or indirectly with end beneficiaries, and facilitators that finance, support, coordinate, or implement TA projects. Our scope focused on TA to mobilize finance for agri-SMEs, particularly missing-middle enterprises, whether they are donor-funded or tied to investment vehicles. Private sector TA from agrifood corporate programs was excluded due to the absence of publicly available information.

Interviews with 13 organizations provide industry insights and inform four case studies. Leveraging the CLIC membership and network, we conducted a series of interviews with experts from 13 organizations active in or around the TA space (See section 2.2 in Annex 2). They validate our qualitative findings throughout the report, highlight key implementation dynamics and trends, and generate learnings on TA delivery from four successful models.

We also leverage expertise from CLIC's Agrifood Investment Connector (The Connector), which has provided impact assessment and investment facilitation to agri-SMES in SSA and LAC since 2023 (CLIC). The Connector supports agribusiness' climate and nature-positive business models. The program responds to investors' struggle to find adequate bankable opportunities by supporting agri-SMEs along their readiness journey. Globally, its portfolio comprises 33 companies across SSA and LAC that have mobilized USD 17 million in climate finance since engaging with the program.

The goal of this report is to increase ecosystem visibility to facilitate coordination, rather than prescribe solutions. We document patterns observed and share what providers themselves report through interviews about what works in their contexts.

This mapping supports decision-making for three audiences:

- **Funders** can identify where their current portfolios may be duplicating efforts or overlooking underserved markets.
- **TA Providers** gain an understanding of how their services sit within the broader ecosystem, enabling them to identify complementary organizations and coordination opportunities.
- **Investors** can identify which TA providers operate in their target geographies and consider potential partnerships to strengthen their pipeline.

The report is built out as follows:

- **Section 1** provides the conceptual framework: defining TA, how support needs evolve across enterprise stages, and delivery models.
- **Section 2** describes our three-tiered methodology and acknowledges research limitations.
- **Section 3** presents findings from mapping 207 organizations and analysis of 30 climate-focused providers.
- **Section 4** synthesizes findings into four structural issues constraining ecosystem function.
- **Section 5** translates these into actionable implications for funders, providers, and investors.
- **Section 6** concludes.

1. UNDERSTANDING TECHNICAL ASSISTANCE (TA)

Agri-SMEs in emerging markets face capacity constraints that limit both their commercial growth and their development impact. Technical assistance (TA) aims to address those constraints directly, by strengthening operations, resilience, and investment readiness. TA is often provided alongside commercial investments, serving as a tool that benefits investors, companies, and the communities they reach (TechnoServe 2019). This section defines TA and the capacity gaps it addresses, examines how support needs evolve across enterprise development stages, and outlines three delivery models linking TA to investment.

Technical assistance refers to advisory and capacity-building services designed to address specific gaps in SME capabilities, tailored and delivered over defined timeframes to meet investor and/or market requirements (Tameo 2023). Services can range from non-material inputs (training, mentoring, strategic advisory) to material inputs (equipment, software, data systems), though the core purpose is knowledge transfer that builds lasting organizational capacity. Table A1 in Annex 1 provides additional descriptions of key terms used in this report. Section 1.1 in Annex 1 highlights different ways TA can be defined. Table A1.2 in Annex 1 lastly identifies common gaps that TA aims to fill.

1.1 TA ALONG THE SME DEVELOPMENT STAGE

The type of TA an enterprise needs generally depends on its stage of development. Support requirements shift as companies mature, creating distinct patterns across three broad stages. Early and growth-stage enterprises typically receive targeted support addressing well-defined issues, while more mature enterprises benefit from comprehensive, multi-dimensional projects (Tameo 2023). TA services should also evolve according to an SME's level of management capacity (ASLC 2025) and should be simple to implement and base its complexity on more than just type and maturity of a firm (ISF Advisors 2023).

This progression assumes enterprises operate in markets where commercial returns eventually justify advisory costs, though not all do. Enterprises operating in land restoration, forest protection, or early-stage value chains for nutritious foods may never reach a point where commercial advisory markets serve them. For these actors, the question is not how to graduate from subsidized TA, but how to design sustainable, long-term TA delivery models.

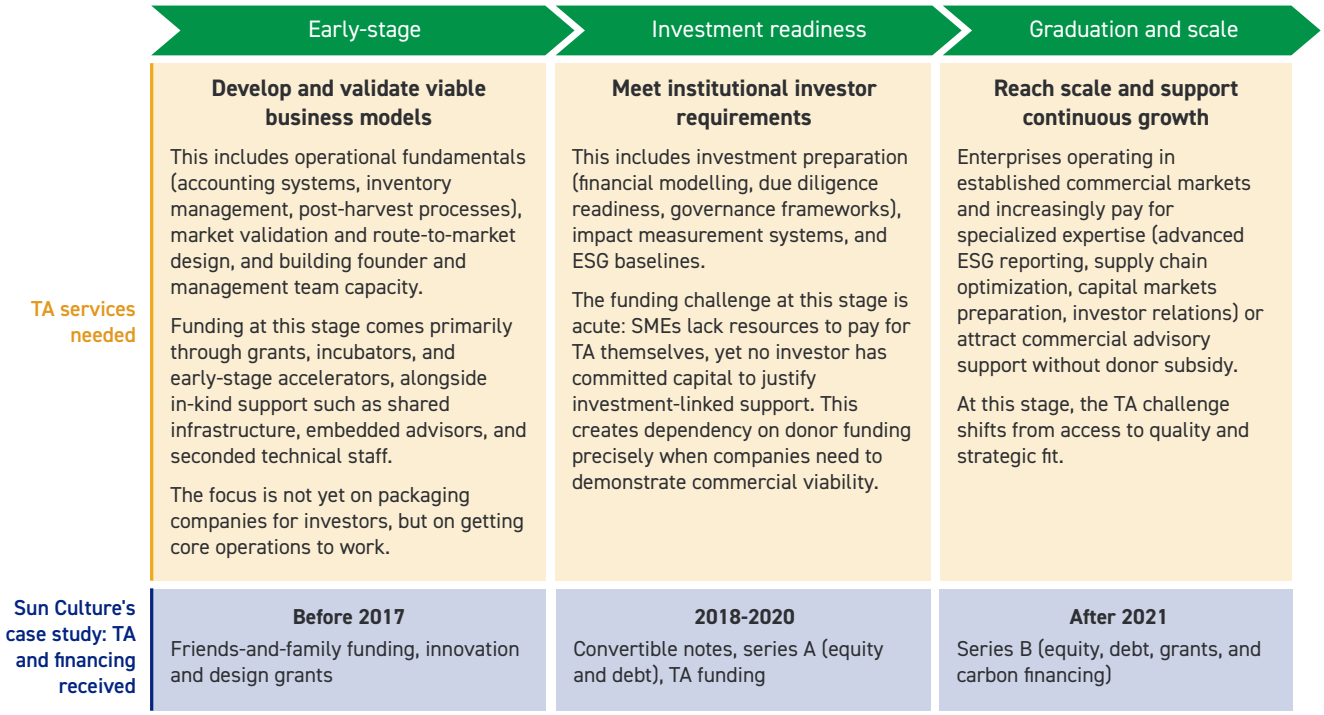
Three stages of an SME's development can be defined: early-stage, investment readiness, and graduation and scale—all of which have differing TA requirements. Figure 1 highlights the type of TA required as enterprises mature across each stage, to match their growth and search for adequate financing. During early stages, TA helps SMEs develop and validate business models. Then, the support shifts to help them meet investor requirements, and our interviews consistently identified this stage as critically undersupplied relative to demand. To reach scale, TA support remains critical in strategic areas that support growth.

The stages above describe when different support is needed as enterprises mature. We provide a complementary lens which describes what support is provided, drawing on TechnoServe's typology (TechnoServe 2019). The typology defines TA services as falling into four categories based on their strategic goal: Core Business Support (internal strengthening), Inclusive Business Support

(smallholder and community engagement), Value Chain Development (market linkages), and Market Systems Development (enabling environment).

These two lenses interact: core business support dominates at the early stage, while value chain development and market systems support become increasingly important at scale. Box 1 illustrates this progression through SunCulture's 10-year TA journey, showing how support needs evolved as the company moved from early validation through multiple investment rounds to commercial scale. Figure 1 also supports this box by showcasing SunCulture's evolving TA journey.

Figure 1. TA support required across the three stages of an SME's development



Box 1. SunCulture's 10-Year journey illustrates the potential of TA when delivered throughout the lifecycle

SunCulture, a Kenyan solar irrigation company, offers one of the clearest examples of what sustained, evolving TA can achieve when delivered throughout an enterprise's lifecycle.

The company started with a straightforward problem: most smallholder farmers in sub-Saharan Africa lack access to affordable irrigation, limiting yields and resilience to drought. SunCulture's co-founders began with personal savings and friends-and-family funding to develop early prototypes (CNBC 2022). USAID's Powering Agriculture program provided an early innovation grant to support product development and geographic expansion (AgFunderNews 2016), and a GSMA grant funded design of the RainMaker 1, a more affordable pump (Shell Foundation 2025).

The critical TA breakthrough was operational. In 2016, Shell Foundation and FCDO's Transforming Energy Access (TEA) platform funded the development of SunCulture's PAYGrow (pay-as-you-grow) consumer financing model, the first of its kind for solar irrigation. Shell Foundation worked directly

with SunCulture to design the financing product, the associated sales processes, distribution systems, and performance metrics (Shell Foundation 2025). The PAYGrow pilot drove over 900 pump sales and demonstrated that smallholder farmers repay reliably when the product works and support systems are in place. That data gave SunCulture the credibility to raise its first commercial capital: a convertible note from EDF in 2018 (Shell Foundation 2025).

As the company matured, TA shifted from product development to operational scaling. Further Shell Foundation and TEA grants funded a smaller, cheaper pump (the RainMaker 2), IT systems to manage growing customer volumes, and operational capacity for regional expansion (Shell Foundation 2025). This support unlocked debt and equity from Lions Head and AlphaMundi, and laid the groundwork for a Series A fundraising round in 2020. Acumen's investment through its Resilient Agriculture Fund (ARAF) came with a dedicated TA facility covering farmer training costs that the company could not afford on its own (AgFunderNews 2021), alongside board-level strategic support and investor network connections.

At commercial scale, TA shifted again, this time toward pioneering new revenue models. Shell Foundation and TEA funded a pilot to test whether carbon credits could subsidize pump costs for farmers. The pilot proved the concept, leading to a carbon credit facility from BII and Shell Foundation that eventually reached over USD 6 million (Shell Foundation 2023; 2025). SunCulture closed a USD 27.5 million Series B in 2024, blending equity, debt, grants, and carbon financing (Sun Connect News 2024), with a further investment from WaterEquity in 2025 (Disrupt Africa 2025). Donor-funded TA has effectively ceased: SunCulture now holds over 50% market share for smallholder solar irrigation in sub-Saharan Africa, with more than 47,000 units sold across Kenya, Uganda, and Côte d'Ivoire.

The SunCulture story illustrates three things about TA. First, different providers addressed different needs at different moments, collectively building an enterprise that eventually attracted commercial capital without subsidy. Second, the most impactful TA was not generic advisory but deeply embedded in operational reality: designing financing products, building distribution systems, and testing revenue models. Third, this level of sustained engagement required patient, coordinated support from funders willing to stay involved over a decade.

SunCulture has unique characteristics that facilitated this journey. The company operates in solar irrigation, a sector with clear commercial returns, strong donor interest, and growing investor appetite. It attracted globally connected and well-resourced programs from very early on. The harder question is whether this model of sustained, evolving TA can be replicated for less visible enterprises, operating in less commercially attractive segments, or based in markets with thinner investor and TA provider networks. Designing TA programs that systematically identify and support high-potential SMEs before they appear on investor radars remains one of the ecosystem's unresolved challenges.

1.2 DELIVERING TA: THREE MAIN MODELS

These stage-based agri-SME needs are met through three main delivery models, each with different approaches to linking TA and investment (FAO 2024; Enclude 2017) (Table 1). The diversity of delivery models reflects genuine ecosystem complexity: an SME may receive strong

support within one model but struggle to transition when its needs outgrow that provider's scope. This creates gaps in the continuum of support.

Table 1. Three TA delivery models

TA model	Structure	Examples
Technical assistance facilities (TAFs)	TAFs integrate TA directly with investment vehicles and can be structured as single- or multi-fund facilities (ISF Advisors 2022), with either a pre- or post-investment focus. Pre-investment TAFs require donor funding without guaranteed investment outcomes, creating undersupply precisely where additionality may be highest. Post-investment TAFs are more financially sustainable. They are often positioned as a risk mitigation strategy for the portfolio, and support can be built into fund management fees. Interviews confirmed that most TA is delivered post-investment, reflecting limited early access to pipeline information and confidentiality constraints that restrict pre-investment engagement.	Iungo Capital Mercy Corps Ventures FINCA Ventures ARAF - Acumen IDH Farmfit Fund (see Box 3 & 4)
Linked models	Linked models maintain organizational separation between TA providers and investors while coordinating their activities. TA providers operate under independent governance but build structured relationships with specific investors, preparing SMEs to meet partner requirements and creating a referral pipeline. This model attempts to balance two competing goods: the TA provider's ability to assess SME needs without being constrained by a single investor's mandate, and the investor's need for a pipeline that meets their specific criteria. In practice, the balance is difficult to maintain. Providers face pressure to tailor advice toward partner investors' preferences, which can narrow the range of options presented to SMEs.	AC4A Progreso Village Capital IDH reVive (see Box 3) SSNUP (see Box 5)
Independent delivery	Independent delivery fully separates TA from capital deployment. Independent providers work with the widest range of SMEs and can assess enterprise needs unconstrained by any single investor's mandate or thesis. However, without structural linkages to investors, these providers have less visibility into evolving investor requirements. This makes it harder to deliver TA that positions SMEs for investment, regardless of provider quality. The challenge is compounded when delivery relies on dispersed networks of local contractors operating without shared quality frameworks or feedback loops from the investment side. Bridging this gap requires independent providers to invest heavily in relationship-building with investors, which few are resourced to do systematically.	CLIC's Connector Catal1.5t Climate Finance Accelerator Care International Prospero (see Box 2)

Each model involves trade-offs. TAFs offer the tightest alignment between TA and investment but concentrate support on enterprises already in an investor's pipeline. Linked models extend reach beyond a single fund, but creates tension between maintaining advisory independence and aligning with investor interests. Independent delivery serves the broadest population of SMEs but faces the weakest connection to investment outcomes.

These trade-offs play out against a challenging funding landscape. An analysis drawing on lessons from the Commercial Agriculture for Smallholders and Agriculture (CASA) program estimates that roughly 80% of TA grants come from public sources, typically via donors, DFIs, and international NGOs (CASA 2020).

Funders increasingly expect SMEs to co-finance TA to improve sustainability, but uptake remains limited. Co-funding can be prohibitive for SMEs seeking acceleration support and risks excluding less mature companies precisely at the stages where support gaps are most acute. Research on a sample of business development services providers shows that enterprises that pay for support perform better than those that do not; however, fee-based structures need to account for the type and stage of maturity of enterprises (ISF Advisors 2023). The debate around co-funding also raises the question of what TA services would be most appropriate to co-fund, such as activities clearly aligned with core business objectives.

Pre-investment TA, where the funding gap is widest, may also be where additionality is highest. IDH Farmfit Fund's recent analysis highlights that while pre-investment TA can be catalytic, it is costly and difficult to justify without a clear investment outcome (IDH 2025). Closing this gap likely requires more integrated approaches that align TA delivery with investor needs from the outset, alongside dedicated funding for pre-investment engagement where the commercial case alone is insufficient.

2. METHODOLOGY

2.1 APPROACH AND SCOPE

We mapped over 200 TA organizations—based on publicly available information found online—that support agricultural value chain players in LAC and SSA, using a three-tiered approach (Figure 2):

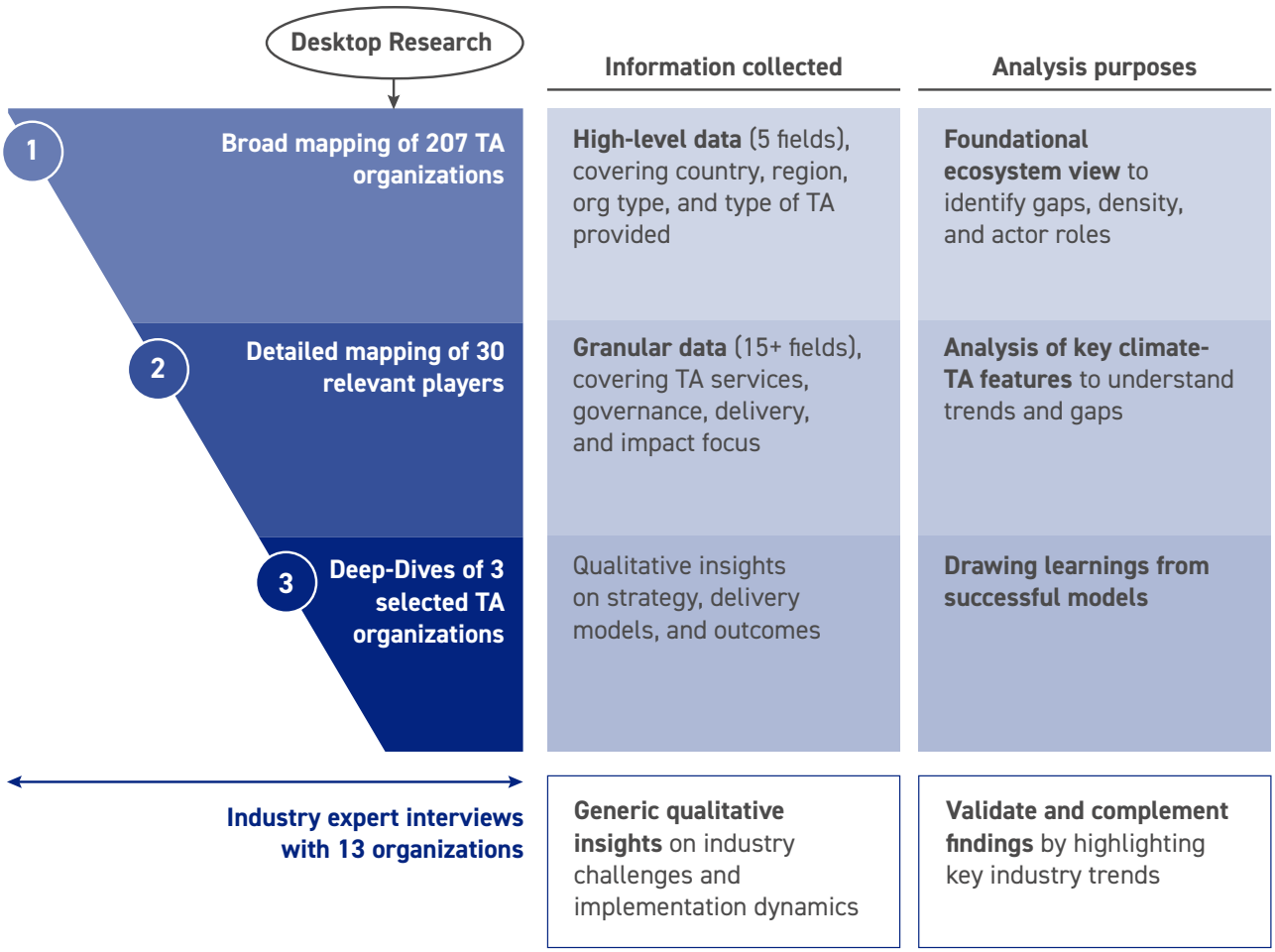
- **A comprehensive database of 207 organizations**. We built this database using publicly available information e.g., the CABI Technical Assistance database (110 providers, last updated 2023), internal knowledge, and expert referrals. We categorized organizations by type, services offered, and geographic footprint. Analysis is presented in section 3.1.
- **A deeper analysis of 30 climate-focused organizations**. We selected 30 organizations leading climate-focused TA for agri-SMEs. This enabled detailed analysis of climate-gender-nature integration, governance models, service bundling, and impact assessment approaches. Analysis is presented in section 3.2.
- **Case studies of 3 leading TA organizations.** We selected 3 organizations with effective and successful models, looking at strategy, delivery, and outcomes. We drew four case studies and highlighted lessons learnt from each. Analysis is presented in section 4.

We narrowed the 207 to 30 by ranking against criteria including Connector mandate fit, strategic learning value, climate-gender-nature focus, SSA/LAC scope, and public information depth, then refined the shortlist through expert interviews (See Annex 2.1). The remaining 177 mostly fell outside the climate-focused agri-SME TA scope or lacked sufficient public information.

Annex 2.1 provides more details about data collection and analysis processes. The regional scope was chosen as it aligns with the regions of activity for CPI's agri-SME TA practice. Future research could expand this analysis to additional regions with significant agri-SME TA needs, such as Southeast Asia.

We conducted interviews with TA experts from 13 organizations (Annex 2.2) to provide industry insights and inform the four case studies. We gathered expert perspectives from 13 organizations active in or around the TA space to validate findings, understand implementation dynamics, and highlight key trends and approaches in the industry.

Figure 2. CPI's data collection approach



2.2 DATA LIMITATIONS

While this research helps increase the visibility of an undocumented landscape, several factors affect the scope and representativeness of our analysis.

Table 2. Data limitations

Data limitation type	Description
Exclusion of portions of the TA ecosystem	Due to the lack of publicly available information on TA provided to agri-SMEs by certain parts of the TA ecosystem, we have had to exclude certain types of TA provision from this report. This report has therefore not examined private-sector TA (vertically integrated corporate programs), informal support networks, peer groups, or TA provided by local financial institutions.
No verification of reported information	This database documents what organizations claim in publicly available materials (websites, program descriptions, donor reports). We have not verified actual delivery capacity, service quality, or operational scope with SME client organizations. Interviewees from TA providers also consistently reported that public materials often describe aspirational offerings while implementation may differ. We were unable to verify information across all 207 organizations; further validation is required on geographic coverage, service bundling patterns, and specialization gaps. Users should verify capabilities directly before engaging providers and are welcome to provide feedback on the database.
Geographic coverage gaps	The mapping was facilitated by CABI's technical assistance database (with 110 providers active primarily in Africa) and CLIC's Connector's industry knowledge. Therefore, it reflects CLIC's regional focus on sub-Saharan Africa and Latin America and does not intend to be globally comprehensive, likely undercounting organizations active in other developing and frontier markets.
Bias toward international initiatives and underrepresentation of national players	We identified only 15 national organizations (8% of the total dataset) despite interviewees emphasizing their critical role. Local providers are best discovered through informal networks, chambers of commerce, or government relationships rather than online materials, making them absent from our mapping.

3. FINDINGS

3.1 MAPPING THE TA ECOSYSTEM

SAMPLE OVERVIEW

Our analysis represents one of the few systematic attempts to document this fragmented landscape. The database of 207 TA organizations is publicly available and designed as a starting point for funders, providers, investors, and SMEs navigating the ecosystem. See Annex 2.1 for more information on the data collected.

Our dataset contains primarily global organizations headquartered in developed economies operating in SSA and LAC. Two-thirds (65%) are headquartered in developed economies, such as the US, UK, and the Netherlands, and most of them have a multi-region focus, including 90 spanning both SSA and LAC. The remaining third are regional specialists, based regionally (27%) and domestically (8%) in the countries they serve, yet we found 12 international organizations specializing in one region, mainly in sub-Saharan Africa.[1]

TA organizations in our dataset are geographically concentrated in sub-Saharan Africa. The vast majority (84%) operate in SSA, with 19% focusing exclusively on that region. In comparison, about half (56%) have operations in Latin America and the Caribbean, followed by Southeast Asia (47%) and Northern Africa (36%). The concentration in SSA reflects both the focus of this research on the region and donor allocation patterns.

Consultancies and NGOs dominate the TA space, with TAFs being a significant minority. Consulting and advisory firms represent a third (32%) of TA organizations mapped in this study, followed by non-profit organizations (29%), and impact investors with TAFs (14%). The majority are direct providers based in both developed and emerging economies, while the remainder function as facilitators—sponsors, funders, and TAF managers—who coordinate TA delivery rather than providing services directly.

GEOGRAPHIC ANALYSIS

TA providers concentrate heavily on a small number of hub markets. According to information reported on TA organizations' websites, in SSA, five countries are served by over 80 TA organizations: Kenya, Ghana, Uganda, Niger, and Rwanda. In LAC, the TA organizations we analyzed clustered their operations in large EMDEs; Colombia and Peru were both served by 61, and Mexico by 50.

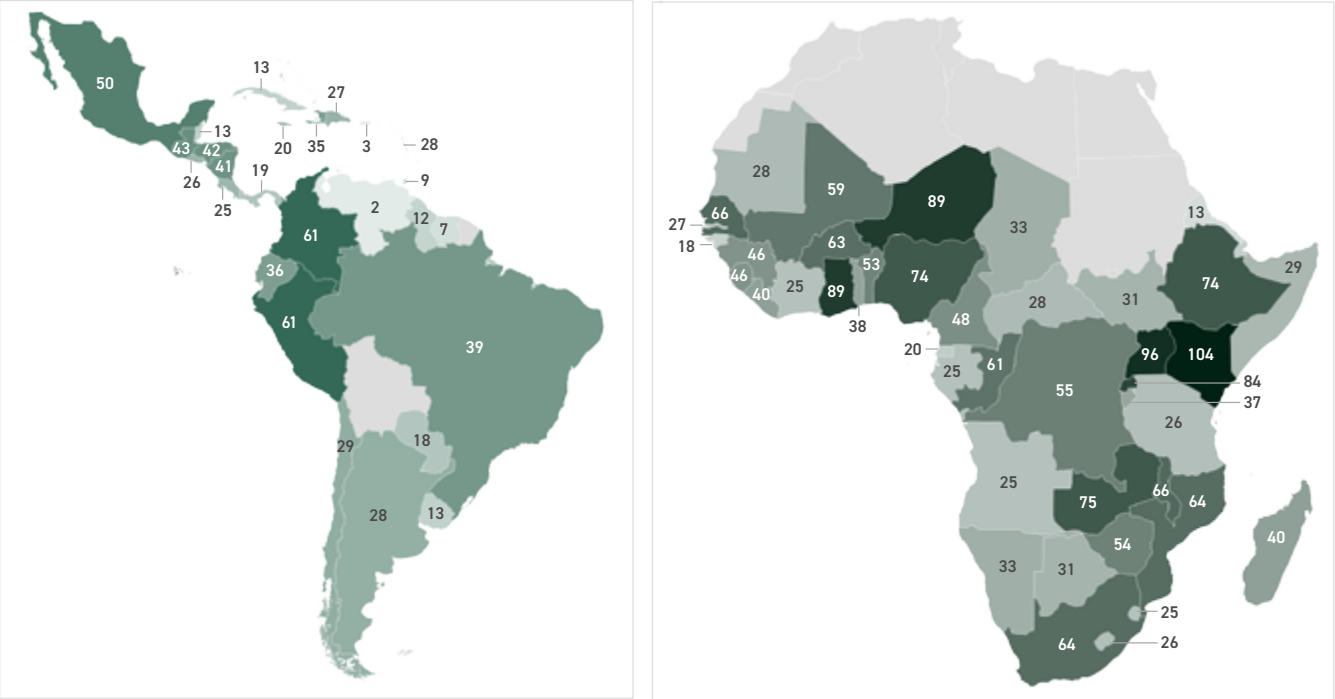
Kenya is the largest reported TA hub in the SSA region, followed by South Africa. Kenya dominates SSA's TA landscape with 104 organizations—60% of the region's total—including 14 headquartered regional players. This concentration creates both benefits and risks. Benefits include ecosystem density that enables provider coordination and easier SME navigation. Risks include frontier market

1 We define global or international TA organizations as players based in developed regions and operating in EMDEs (e.g. UK > Kenya), regional TA organizations as based and operating in one EMDE region (e.g. Kenya > East Africa), and local, domestic or national TA organizations as based and operating in one country (e.g. Kenya > Kenya).

neglect, where ecosystem density remains underdeveloped, potentially creating market failures in the areas of greatest need.

In contrast, least developed countries were the most underserved by TA providers of the sample we examined. In SSA, the least developed countries (LDCs), Guinea-Bissau and Eritrea, each have fewer than 20 organizations, while in the SIDS, Cabo Verde has six. In LAC, countries with fewer than 10 organizations are predominantly SIDS—such as the upper-middle-income nations Suriname, Saint Lucia, and Saint Vincent and the Grenadines. We identified two organizations in Venezuela, a lower-middle-income country. This pattern suggests potential market failures where vulnerability is highest.

Figure 3. Map of TA organizations active per country, SSA and LAC



Domestic organizations are difficult to map systematically and appear under-represented in the sample analyzed (8%), despite interviewees emphasizing their essential role. We found only 12 national TA organizations across SSA (operating in Ghana, Kenya, Malawi, South Africa, Uganda, Tanzania, and Zambia) and 3 across LAC (operating in Colombia and Mexico), despite interviewees emphasizing the importance of partnering directly with local providers who deliver TA on the ground and maintain existing relationships with beneficiaries and intermediaries. As they are difficult to map from publicly available information, international organizations often need to access those local networks through chambers of commerce, industry, or public bodies.

ANALYSIS OF TA SERVICES

Over two-thirds of organizations (68%) in our database describe comprehensive TA service packages. Most organizations present themselves as offering holistic support to address interconnected challenges that cannot be fixed in isolation. From public materials, it is unclear

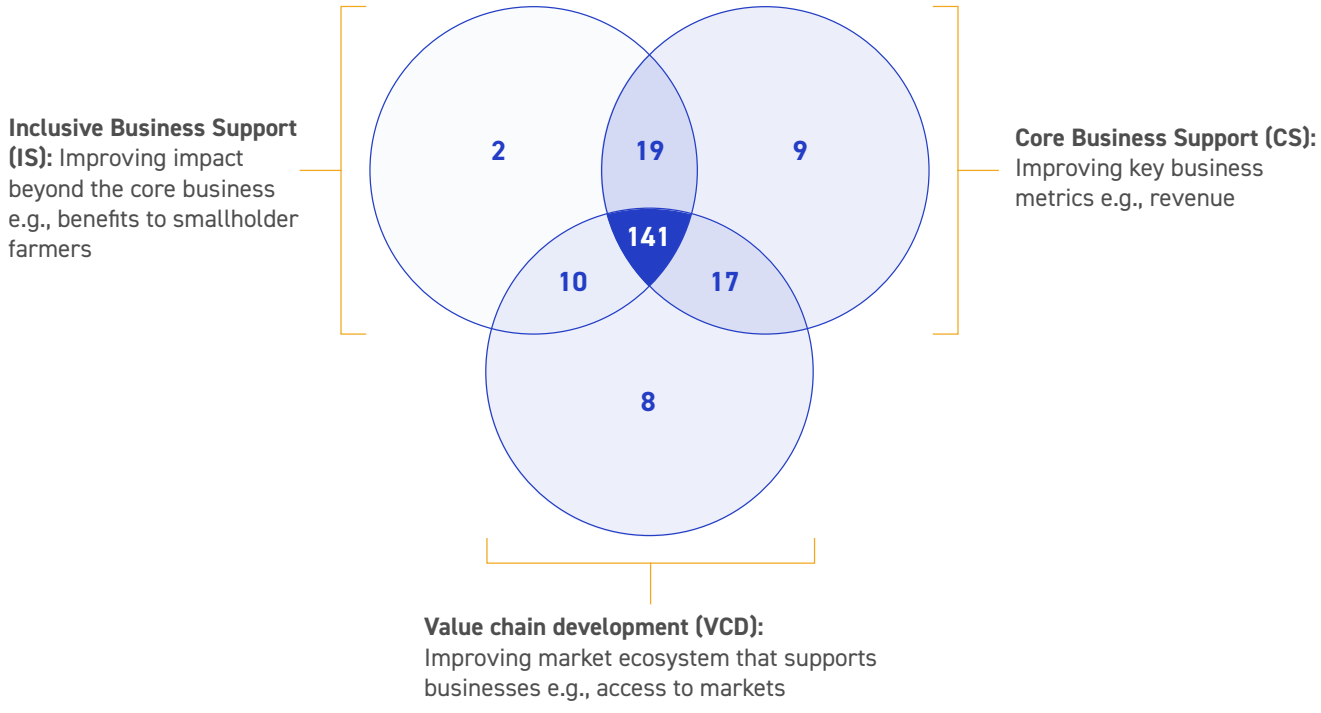
whether this reflects a belief that SMEs need a single provider, funder preferences for 'one-stop shops,' or actual comprehensive capability. We found that 141 providers combine core business support, inclusive business support, and value chain development—as defined by TechnoServe (2019) and in section 1.1 of the report—and less than 10 organizations provide only one type of service (see Figure 4).

Areas of focus tend to vary by organization type. Consultancies are the most common organization type in our sample and the primary providers of core business support, including those that offer this service exclusively. While NGOs come second, they are the first to offer inclusive business support and value chain development services.

Over a third of organizations (40%) complement their core offerings with hands-on agronomic support. We found 82 providers who mentioned support for farming techniques, most commonly bundled with other services in a complementary approach. NGOs significantly outweigh consultancies in delivering agronomic services. This highlights the challenges of effectively working in the food and agriculture sectors. Its inherent complexity creates a key need for dedicated agriculture training on top of general business support. This is particularly true for agribusinesses to meet international standards, as one interviewee pointed out.

Whether this bundling reflects actual delivery capacity or market positioning is unclear from public information. Providers were more likely to list TA services ranging from business model support, gender strategy, investment readiness, financial planning, HR and legal support, as well as digitalization. A comprehensive scope might be used to reduce duplication, meet funder preferences for 'one-stop shops' and attract SMEs, even where specialized expertise is limited.

Figure 4. Type of TA services provided



3.2 DETAILED ANALYSIS: 30 CLIMATE TA ORGANIZATIONS

SAMPLE OVERVIEW

We selected 30 organizations strategically relevant to the Connector based on their climate specialization and operation in SSA/LAC. The sample, representing 14% of the entire dataset, includes mostly international climate-specialized TA providers and facilitators supporting agri-SMEs. More details on the selection criteria are available in Annex 2.1.

- The sample includes a mix of TA providers and facilitators (see Table 3), spanning NGOs (half of the sample), impact investors with TA facilities, consulting firms, DFI and donor facilities, one intergovernmental organization, and one accelerator.
- All provide climate-oriented TA for agri-SMEs, with a focus on mitigation and/or adaptation.
- Nearly all operate in SSA, and around two-thirds also have activities in LAC.
- Most are global actors with multi-region footprints, complemented by 6 regionally focused organizations operating in SSA.

Table 3. 30 TA organizations analyzed in more detail, by provider and facilitator

Providers[2]	Facilitators[3]
60 Decibels	Aceli Africa
ACDI/VOCA	AgDevco
African Agri-tech Scale-Up Programme (Endeavor South Africa)	CASA Programme
Agova	Climate KIC
Agrifrontier	IDH
AlphaMundi Foundation	iungo Capital
CABI	Mercy Corps Ventures
Care International	Root Capital
Catal1.5t	SSNUP
One Acre Fund	The Nature Conservancy (NatureVest)
Prospero	
Progreso	
SAIS (GIZ)	
SNV	
Solidaridad	
Swiss Contact	
TechnoServe	
VC4A	
Village Capital	
WINROCK International	

2 TA providers are organizations providing direct or indirect TA services to end beneficiaries. They can be specialized private or public entities, consulting firms, independent consultants, non-profit organizations, investment firms, development finance institutions, and can themselves subcontract other TA providers.

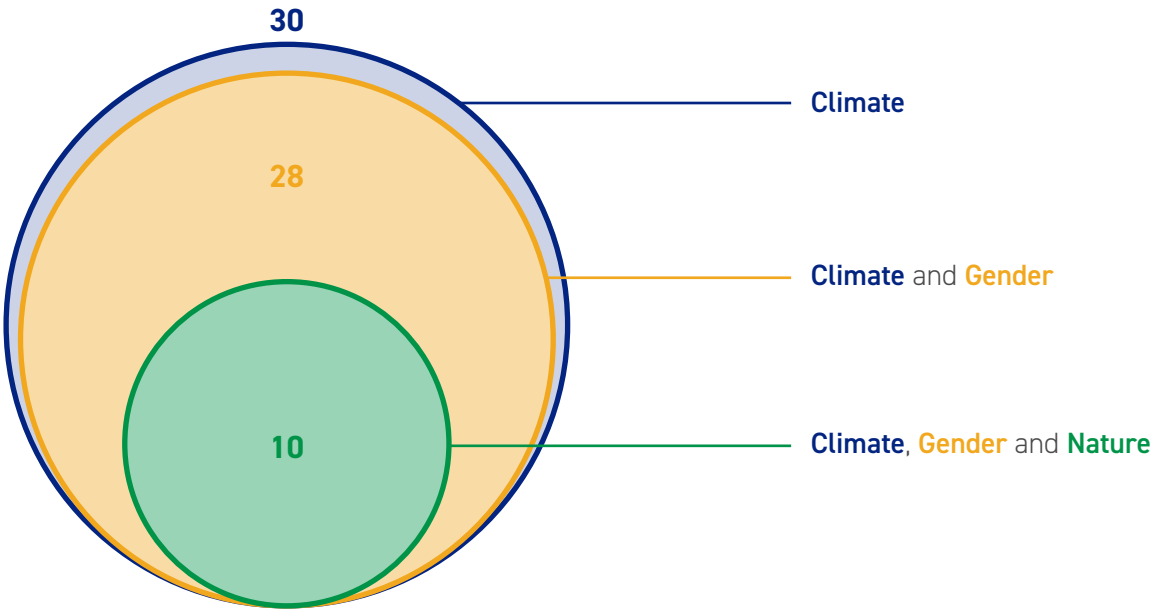
3 TA facilitators are donors, sponsors, investors, fund managers, scientific bodies, networks, and chambers of commerce/industry associations that partner with TA providers by financing, supporting, coordinating, or implementing TA projects and programs.

IMPACT FOCUS ANALYSIS

Analysis of public materials reveals that dual climate-gender integration is standard among climate-focused TA leaders. Nearly all organizations (28) describe themselves as integrating gender equality and women's empowerment as strategic priorities or components of specific programs, through HR support, strategy, and sourcing models. Several run dedicated TA programs, placing a strong emphasis on gender, such as AlphaMundi Foundation's Daraja Impact program for women entrepreneurs.

Nature integration appears less systematized than climate and gender work. Fewer providers state biodiversity protection or ecosystem resilience as standalone objectives. Of all organizations, only one-third (10) say they integrate nature considerations to varying degrees, and fewer explicitly mention supporting nature-positive practices, such as agroecology and regenerative agriculture. Specialized capacity appears undersupplied, potentially creating a supply-demand mismatch given the increasing prominence of nature on investors' agendas (MDB Common Principles for tracking nature-positive finance). TA providers offering deep expertise in climate and nature impact assessment may constitute a niche offering, given the limited explicit reference to nature objectives in the TA providers reviewed.'

Figure 5. Nexus of Climate, Gender, and Nature considerations in TA organizations' activities.

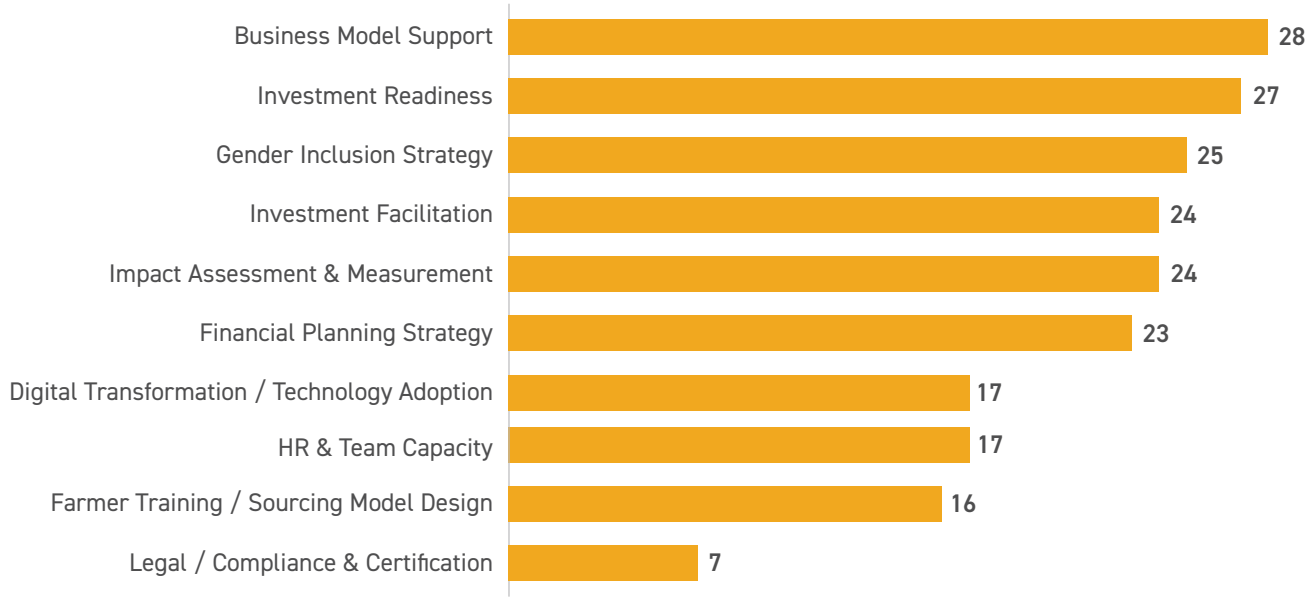


Many organizations recognize the interconnectedness of climate, food security, and livelihoods, with nearly half supporting smallholder farmers alongside agri-SMEs. They do so through dedicated services or programs, thereby creating value chain synergies. They typically integrate agronomic support through training, inputs, or equipment. Five TA players describe comprehensive impact strategies spanning climate, nature, food security, livelihoods, and system-level change.

ANALYSIS OF TA SERVICES AND DELIVERY

Like the broader landscape, most providers describe using bundled support. Over 25 TA organizations reported services spanning business model support, investment readiness, and gender inclusion, key areas that support agri-SMEs in securing funding from impact investors. Other common services mentioned include impact assessment and measurement, financial planning and investment facilitation (see Figure 6). Offering comprehensive service packages reflects a trend toward holistic support that strengthens both the internal capacity and external impact of agri-SMEs. However, attempting comprehensive coverage across all services may dilute expertise, particularly in specialized technical areas. Bundling likely reflects competitive dynamics as funders may prefer comprehensive programs, or the belief that SMEs need a single provider, which seems easier in the context of limited internal capacity and market opacity.

Figure 6. Types of TA services provided by the 30 TA organizations



While over half of the TA organizations provide support throughout the investment cycle, fewer focus solely on pre-investment. Based on an analysis of online materials, half (16) of the organizations provide support both before and after investment: before investment to best prepare SMEs to receive capital, and after investment, to maximize value for investors. Fewer (9) organizations provide services only at the pre-investment stage to help SMEs reach investors and secure a first round of commercial capital. This distribution reflects the financial sustainability challenge discussed in Sections 1.2 and 4.1: organizations focusing solely on pre-investment struggle to fund operations without committed investor capital, while those serving both stages can balance donor-funded early support with fee-generating later support.

IMPACT ASSESSMENT SERVICES

Almost all TA organizations examined provide impact assessment and measurement services as part of their offering to agri-SMEs. However, the impact assessment approaches used vary significantly.

Impact assessment serves multiple audiences, each with different requirements:

- Donor reporting requires the demonstration of results against agreed indicators, typically focused on reach (beneficiaries served) and claimed impact (estimated GHG reduction, farmers supported).
- Investment preparation, in contrast, requires forward-looking assessment of impact potential, materiality and measurability to inform due diligence. Investors increasingly demand sophisticated analysis spanning climate mitigation and adaptation, nature-positive practices and gender inclusion - areas requiring specialized technical expertise that many TA providers struggle to deliver credibly.
- SME operational improvement using assessments to identify efficiency opportunities and guide management decisions. This approach, exemplified by Root Capital's "client-centric" impact work, remains relatively rare because it requires adapting frameworks to SME context and capacity rather than standardized reporting.

Three main delivery models emerged from our analysis:

- Tools and platforms (e.g., IDH's FarmFit Insights Hub, 60 Decibels toolkits) provide SMEs with frameworks for self-assessment. This reduces TA provider costs and enables scale, but quality depends on the SME's willingness and capacity to execute well.
- TA provider-led thematic assessment (e.g., Catal1.5t, CLIC Connector) involves TA organizations conducting assessments on specific dimensions (e.g., GHG emissions, climate resilience pathways, gender inclusion metrics). This requires provider expertise but enables consistent methodology across cohorts.
- Comprehensive E&S management (e.g., AgDevCo) integrates impact assessment with environmental and social safeguards, covering compliance, risk management, and governance alongside positive impact measurement.

The ecosystem lacks common Impact Assessment (IA) and Measurement frameworks, creating significant comparability issues. The absence of common IA frameworks in use by TA providers means that metrics are often not standardized or comparable. The wide variation in metrics makes it difficult to aggregate. One TA provider may measure "tons of CO_2 avoided," another may calculate a "climate resilience score," or "regenerative practices adopted". How they measure will also differ across organizations. Additionally, the quality of IA approaches also varies. Self-service tools produce a different quality from expert-led assessments.

Standardization faces legitimate constraints. As TA providers noted in interviews, frameworks suited for tech startups may not fit agricultural enterprises. Climate impact varies by crop, geography, and farming system. Nature impact depends on baseline ecosystem conditions. Gender dynamics differ across cultural contexts. The tension between efficiency (common metrics) and appropriateness (context-specific assessment) highlights existing key trade-offs in the sector.

4. CHALLENGES TO ECOSYSTEM BUILDING

Before turning to where the system falls short, we set out what effective TA does when it works. Drawing on the provider sample and expert interviews, we treat four functions as core: upskilling SMEs in the operational areas they need to grow; connecting them to networks of investors, peers, and supply chain partners; channeling access to follow-on capital; and improving the metrics (revenue, margin, climate, gender, nature) that determine both viability and investibility. A fifth feature underpins these functions: the TA itself should be open to judgement, with monitoring and evaluation that let funders, providers, and SMEs see whether the support is working.

The gaps set out in this section emerged consistent when we assessed the ecosystem against this benchmark, across both regions and across provider types. Several other relevant questions came up (the quality of skill-building offers, the trade-off between high-touch bespoke TA and low-touch digital tools, the case for TA-funded sector-level public goods), but these either fall within one of the four gaps or are better treated as areas for further research.

Our analysis identifies four interconnected gaps that limit TA effectiveness: information, pre-investment funding, standardization, and collaboration incentives. Information gaps prevent efficient resource allocation, which compounds funding shortfalls. A lack of standardization raises transaction costs and discourages the coordination that could partly compensate for limited funding. In the following sections, we explore each challenge in detail, drawing on desk research and interviews with TA experts from 13 organizations (see Annex 2.b. for the list). We also provide a case study for each gap, as an example of what can be done to address these issues. We also include a case study for each gap, illustrating what addressing it can look like in practice. These four are deliberate, subjective choices: examples of what success looks like in this context, not a ranking or a definitive set of solutions.

4.1 THE INFORMATION DISPARITY

The difficulty we encountered in mapping the TA landscape mirrors some of the difficulties that SMEs, funders, and investors face in navigating it. Providers in hub markets (Kenya, Nigeria, South Africa) are significantly easier to identify than those in frontier markets, creating uncertainty about whether observed concentrations reflect genuine provider density or simply greater digital visibility. This reflects a structural feature of the landscape that shapes how resources flow and where gaps persist. Accessing quality and updated data about TA providers remains a challenge; we removed 14 organizations from the CABI database that did not have enough public information (often individual consultants or small consulting firms) or were inactive programs. This lack of transparency affects all actors, though in different ways. Our interviews revealed the following patterns detailed in Table 4:

Table 4. Information disparity patterns by actor type.

Actor	Information disparity patterns
SMEs	**SMEs seeking support cannot systematically identify which organizations offer services that match their specific needs, stage, and geography.** They rely on word-of-mouth, chance encounters, or referrals from other programs. Our research focused primarily on provider perspectives rather than direct SME feedback, so the extent to which SMEs proactively seek out TA remains an open question that warrants further investigation. What interviews did reveal, however, is a related problem: SMEs frequently cycle through multiple programs offering similar services, either because providers are not transparent about what they deliver, or because SMEs see "investment facilitation" and pursue any available exposure to investors. This creates duplication (with providers reworking materials already developed by another program to cover the same ground) and, more critically, engagement fatigue. SMEs that recognize programs as repetitive disengage, reducing the quality of participation and potentially displacing other enterprises that would have benefited more from the program.
Funders	**Funders making allocation decisions lack visibility not just of other TA providers, but of the wider landscape of support around target enterprises, including policy initiatives, investment mobilization efforts, and value chain linkages**. This is a familiar donor coordination challenge, but it has specific consequences for TA: multiple funders may support similar services in the same markets while critical needs elsewhere remain unaddressed. TAFs partly resolve this by embedding TA within investment vehicles that have direct sight of portfolio needs. But at the landscape level, no equivalent coordination mechanism exists. If all actors had reasonable visibility of the full range of programmatic support available to agri-SMEs, identifying where, when, and what type of TA would add value would become significantly more tractable, and supply gaps would become more evident.
Investors	**Investors seeking TA partnerships to strengthen their pipeline or portfolio struggle to identify which providers operate in target geographies and have relevant specialized capabilities**. This is particularly acute for investors operating outside hub markets.
TA providers	**TA providers face information barriers in both directions**. They cannot easily identify complementary organizations beyond their immediate networks, limiting coordination that could strengthen service delivery. And they struggle to identify potential client SMEs, particularly high-potential enterprises that are not yet visible to the investor community. Independent providers, which lack the pipeline access that TAFs and linked models provide, are most affected by this bidirectional gap.

The information challenge is most severe at the frontier. Our mapping exercise identified only 15 domestic TA organizations (8%),[4] despite interviewees consistently emphasizing the critical role these organizations play in building local capacity. These providers barely exist online and are discoverable only through informal networks, meaning our sample almost certainly underrepresents them. This matters because national providers often have the deepest understanding of local market conditions, regulatory environments, and SME needs, yet they are the least visible to the international funders and investors who allocate the majority of TA resources. In the following case study, we examine Prospero, a national TA provider in Zambia (Box 2), highlighting its impact at the national level as an example of the kind of organization that systematic mapping exercises routinely miss.

4 The remaining includes regional organizations (27%) and international organizations (65%).

Box 2: Prospero Zambia as an example of a national provider

Prospero is a Zambian non-profit that provides investment readiness TA to SMEs in agrifood and sustainable industries, building a pipeline of investible businesses for local banks and capital markets. The organization engaged over 280 SMEs in the past year across Lusaka, Copperbelt, North-Western, Eastern, Muchinga, Central, and Northern provinces, demonstrating a nationally distributed footprint rather than concentration within capital-city hubs.

Prospero's differentiation lies in how it identifies and accesses SMEs that are outside the reach of international programs. Unlike international accelerators that rely on centralized online calls, formal application portals, and standardized eligibility thresholds, Prospero sources SMEs through locally rooted access channels. The organization maintains a database of approximately 5,000 SMEs across multiple sectors and provinces, enabling targeted circulation of program opportunities. Walk-ins and direct outreach from entrepreneurs form a meaningful portion of the pipeline, reflecting strong brand recognition and trust. Long-standing partnerships with public agencies such as the Citizens Economic Empowerment Commission, financial institutions, the Zambia Credit Guarantee Scheme, mining sector partners, and chambers of commerce generate continuous referrals from enterprises operating beyond formal digital ecosystems. Prospero also maintains a satellite office and SME incubation center in Kalumbila Town in North-Western Province, where it conducts community outreach to engage SMEs in surrounding and remote areas.

Prospero's onboarding model is also structurally different from international programs. Rather than filtering out early-stage or institutionally underdeveloped SMEs, Prospero incorporates them into a phased TA pathway. Through structured diagnostics and sustained support, enterprises are helped to formalize governance systems, strengthen financial management, and progressively meet investment readiness standards. The experience of Eunimos Investments Limited, an integrated agribusiness in Mansa District focused on soya, fish, and poultry, illustrates this approach. Despite strong production capacity and clear market demand, Eunimos lacked a formal shareholders' agreement, structured procurement and risk management frameworks, and investor-ready financial documentation. Prospero delivered tailored support across governance strengthening, internal systems development, and financial structuring, resulting in formalized ownership structures, improved operational accountability, and enhanced credibility with potential financiers.

Prospero illustrates a broader structural gap in TA ecosystems. National providers play a critical role in reaching SMEs and building local pipelines, but their limited visibility in international networks means they are systematically excluded from mapping exercises, funder databases, and coordination efforts. Strengthening the visibility of such providers is a precondition for more efficient TA allocation.

4.2 THE PRE-INVESTMENT FUNDING GAP

TA for pre-investment, early-stage agri-SMEs is underfunded. Concerns about financial sustainability drive TA concentration at the post-investment stage. This is largely because investment-readiness TA lacks viable funding models comparable to those of late-stage accelerators and incubators. Post-investment TA can be built into fund management fees and sold to investors as portfolio protection, creating a sustainable revenue model. However, one interviewed organization highlighted that typical management structures are not designed to adequately finance the level of hands-on support and active management required for effective TA delivery. At the pre-investment stage, however, TA requires convincing donors to fund agri-SME support without guaranteed investment outcomes.

The additionality of capital may be highest at the pre-investment stage, as SMEs need the most support before they can attract capital. Funds need investment-ready companies but are not prepared to provide capacity support and grant capital in the long preparation phase, which can take several years and lead to uncertain outcomes. A lack of support at the pre-investment stage, where companies are too mature for grants but not ready for commercial capital, systematically filters out promising SMEs before they reach scale, further affecting the quality of the investment pipeline.

Our analysis revealed that the post-investment bias persists across delivery models. Several providers noted shifting their focus from pre-investment to post-investment activities to ensure financial sustainability post-covid. For example, IDH Farmfit Fund experienced challenges in the delivery of pre-investment TA due to timeline conflicts and budget constraints. While the SSNUP model encourages pre-investment TA, impact investors who design the projects tend to propose post-investment support for their existing investees. These currently account for around 77% of the organizations benefiting from co-financing (see Box 5). In the following case study, we examine IDH's experience in delivering pre-investment TA through the IDH Farmfit Fund and reVive Hub (Box 3).

Box 3. IDH FarmFit Fund

The IDH Farmfit Fund is a EUR 100 million blended finance impact fund that mobilizes public and private capital to strengthen agri-SMEs and financial institutions in emerging markets, expanding responsible, farmer-centered services and market access for smallholder farmers.

The Fund's approximately USD 3 million TA facility was originally designed to support both pre- and post-investment technical assistance. However, the facility became operational later than initially expected, by which point much of the early pipeline had already been developed without dedicated TA support. Many companies progressing through due diligence were already relatively investment-ready.

During implementation, the Fund gained a clearer understanding of the structural challenges of pre-investment TA within a time-bound investment vehicle. Supporting earlier-stage businesses proved resource-intensive and required long lead times. Conversion into approved transactions was inherently uncertain, while the Fund's 5+1+1 year investment period meant that extended pre-investment engagement increasingly competed with the need to deploy capital. As one IDH team member explained: "Investment readiness programs need to start before the launch of a fund to

build the pipeline, but TAFs are often developed when the fund is launched and naturally focus on post-investment support."

The Fund shifted its primary TA focus towards post-investment engagement, where support proved particularly effective when linked to clearly defined Development Action Plans and impact objectives identified during due diligence. Investees receive tailored support in strengthening operational systems, improving responsible service delivery, and implementing improvements related to client protection, climate resilience, or impact measurement. SMEs co-design TA plans and contribute to budgets, creating strong buy-in. However, cost-sharing is typically only feasible post-investment, when companies have revenue and investor backing. It cannot solve the pre-investment gap.

The Fund's experience reflects a broader sector challenge. Many donor-funded TA programs prioritize field-level outcomes but are less oriented toward building investable business models or financial systems, which limit pipeline conversion.

In response to these lessons, IDH developed the reVive Hub in Colombia as a dedicated, investor-agnostic investment readiness facility for organizations in sustainable land management. The Hub operates independently of fund investment timelines, addressing the structural mismatch the IDH Farmfit Fund experience revealed.

Organizations begin with a self-diagnostic assessment, validated by investment development advisors. This narrows and formulates TA to the biggest gaps in their investment readiness, which is then provided to the internal team and/or grant-funded external technical expertise. Formulating TA plans alone requires three to six months of deep business model understanding rather than standardized templates. Some gaps are common across organizations (financial structuring, governance, ESG alignment) and can be addressed through reVive's standardized proprietary tools. Others require specialized external consultants, increasing per-engagement costs.

Of the 110 organizations scoped, 40 to date have met eligibility criteria and 20 completed TA implementation. The roughly 18% conversion rate reflects the high bar for proven business models ready to scale. On average, companies take 18 months to reach investment readiness.

reVive also reveals the "missing middle" financing gap. As an IDH team member shared, "most investors want more than USD 5 million in investment tickets," meaning even investment-ready companies struggle to find capital at USD 200,000 to USD 2 million ticket sizes. To address this, reVive built a finance network with over 20 members (banks, DFIs, investors) to review the pipeline for matchmaking and co-design the TA. IDH also refers companies that do not meet reVive's criteria to other ecosystem builders, and having built credibility, now receives referrals back, linking its pipeline directly to investor eligibility criteria.

Implications for funders

Pre-investment TA requires different funding structures than post-investment TAFs. An effective facility benefits from a five-year timeframe: approximately six months for design and setup, one to two years for pipeline identification and curation, roughly 18 months of TA deployment, and the remaining period for investor engagement, transaction development, and deal closure. Standalone facilities with explicit mandates for pipeline development must accommodate lower conversion rates, 18-month-plus timelines, and small ticket sizes. These are not design flaws to be optimized away, but structural realities to be designed around.

4.3 THE TENSION BETWEEN STANDARDIZATION AND CONTEXTUALIZATION

TA provision operates within a fundamental tension between efficiency and effectiveness. Efficiency demands common metrics, shared frameworks, and referral systems that reduce duplication and lower costs, but effectiveness demands context-appropriate support tailored to each SME's sector, stage, geography, and operating reality. Both impulses are legitimate, and the TA landscape has not resolved the balance between them.

Coordination failures compound the problem. Before reaching the genuine standardization question, there is a more basic coordination issue. Multiple providers working with the same enterprises or in the same markets frequently duplicate effort because they lack visibility of each other's activities. As one provider reported, the same farmer completed three different climate impact assessments in a single year. This is not primarily a measurement standards problem. Even if all three providers used identical frameworks, conducting the same assessment three times represents wasted resources for both the provider and the SME. It reflects the absence of shared information systems or referral protocols between providers, a coordination gap rather than a standards gap.

Measurement fragmentation creates real costs. Where the standardization challenge does bite is in impact measurement. Metrics vary dramatically across providers, and no widely adopted common framework exists for core TA outcomes. This creates two problems. For investors, it prevents meaningful comparison of TA effectiveness across providers, programs, and portfolios. For SMEs, it imposes repeated compliance burdens, as companies must demonstrate the same capabilities using different methodologies each time they engage a new provider or investor. Some providers are actively working toward common indicators that would enable cross-program comparison and reduce SME burden, but adoption remains limited.

Standardization carries its own risks. Excessive standardization can impose inappropriate models on enterprises operating in specific contexts. As one provider noted, standardized pitch deck formats may work for tech startups but fail agriculture processing companies, where investors need to understand supply chain relationships, seasonal cash flows, and input dependencies that generic templates do not capture. Service bundling, where providers offer pre-packaged TA programs, improves efficiency but reduces the ability to tailor support to individual SME needs. The trade-off is real: a highly standardized TA program can serve more enterprises at lower cost per unit, but risks delivering support that is too generic to address the specific constraints holding any individual enterprise back.

Emerging requirements expose expertise gaps. This tension is sharpened by evolving investor and donor requirements. Our analysis of TA providers suggests that while climate and gender integration are relatively established in TA programming (with recognized frameworks and provider capacity), nature-related requirements are less developed. Fewer standard frameworks exist for nature and biodiversity integration, and provider expertise in this area is thinner. As investor expectations around nature-positive outcomes grow, this gap will widen unless TA providers invest in building relevant technical capacity.

Box 4. IDH Farmfit Fund and Cerise+SPTF: building client protection standards for smallholder agricultural finance

Without common standards for responsible service delivery, the growth of smallholder agricultural finance risks replicating the problems that plagued early microfinance. The IDH Farmfit Fund confronted this directly. Across its pipeline, the Fund repeatedly encountered structural impact risks: credit tied to input provision or offtake arrangements and repaid through crop deductions, creating opacity around pricing, quality assessment, and repayment calculations. In multiple cases in West Africa, cocoa purchasing clerks manipulated quality grading or recorded lower volumes than delivered, effectively cheating farmers out of part of their payments. These were not isolated incidents but prevalent dynamics across value chains. The Fund concluded that strengthening its individual impact due diligence frameworks was not enough. A shared framework was needed to systematically identify, benchmark, and improve responsible practices across the sector.

This workstream was not part of the Fund's original design, but evolved in response to practical experience. In 2022, the Fund partnered with Cerise+SPTF (the Social Performance Task Force) to develop a client protection assessment tool for the agricultural sector, drawing on the pathway that transformed microfinance. In inclusive finance, the Client Protection Pathway coordinated by Cerise+SPTF established common standards that financial service providers commit to, assess themselves against, and progressively implement. Investors now routinely use it in due diligence, and some require it as a precondition for funding. The partnership reflects a shared view that effective tools must be public goods, requiring active communities of practitioners to drive harmonization, learning, and adoption.

The resulting Agri Client Protection (CP) Tool is structured around the same eight Client Protection Standards that underpin microfinance practice (including appropriate product design, prevention of over-indebtedness, transparency, fair treatment, and data protection), but is adapted for agricultural service delivery. Agricultural value chains are more diverse than microfinance lending relationships: they involve input supply, offtake agreements, extension services, and embedded finance, each with distinct risks to smallholders. The tool sits within Cerise+SPTF's broader Responsible Agriculture and Food Sector (RAF) project, which is developing an integrated assessment framework in partnership with organizations including CSAF and IISD.

Some standards translate well across contexts: transparency, fair treatment, complaints mechanisms, and data protection can be broadly standardized. The tension is most acute in three areas:

- **Over-indebtedness required significant adaptation.** In agriculture, credit is often provided in kind and repaid through crop deductions linked to expected harvests. Assessing repayment capacity depends on crop cycles, price volatility, climate risk, and informal income streams. Rigid income-based thresholds do not reflect farmers' seasonal cash flows or production risk.
- **Fair crop pricing is perhaps the most complex.** The price farmers receive is shaped by bundled services (inputs, extension, logistics, certification, quality grading), local and global market dynamics, and risk sharing. The net price may include markups, deductions, or offsets rather than reflect a transparent market benchmark. Standardization must avoid narrow financial metrics that overlook how value is distributed across these arrangements. Assessing fairness requires deep contextual understanding of crop economics, services, and power dynamics, which is extremely difficult to achieve with standard indicators.

- **Dependency risks also vary widely by crop, geography, and service mode**l. A dairy cooperative and an agroforestry program face very different dynamics in terms of how many off-takers exist in the market. The tool therefore combines core principles with contextual filters, though some abstraction and judgement remain necessary.

Standards must also be applied pragmatically. Many agribusinesses operate on thin margins, and overly rigid requirements risk increasing costs or excluding higher-risk and most vulnerable farmers. The aim is to uphold clear safeguards while allowing proportional, context-sensitive implementation.

The pathway draws lessons from inclusive finance with an important distinction. In microfinance, standards emerged in response to serious crises, including clients' loss of productive assets and client suicides. The objective here is preventative: to establish safeguards before such harm occurs. The IDH Farmfit Fund hypothesizes three overlapping stages of adoption driven by the financial sector:

The first phase focuses on standards development and early adoption, with mission-aligned investors integrating Agri CP indicators into due diligence and post-investment action plans. Field testing and iterative refinement through the RAF working group build legitimacy and shared ownership.

The second phase targets capital supply. Engagement with governments, DFIs, and foundations is critical so that responsible service delivery expectations are embedded in funding requirements for impact funds and TA providers.

The third phase reinforces adoption through capital demand. Funds seeking to attract capital, and agribusinesses seeking investment, will have incentives to align with recognized standards. The IDH Farmfit Fund is already seeing early signs among its investees implementing contractually agreed action plans to address client protection gaps.

A tipping point will likely be achieved when funders formally reference the standards in their requirements, multiple investors embed them in policies, agribusinesses perceive tangible business benefits such as improved farmer loyalty and satisfaction, and third-party assessors offer related services. The overall objective is not rapid certification at scale, but gradual normalization of responsible service delivery across a maturing asset class.

IDH Farmfit Fund's work on standards points to a broader implication for how the TA ecosystem is designed. TA funding is typically evaluated based on direct outcomes: how many SMEs are reached, how much capital is mobilized. But sector-level standards development, while slower and harder to attribute, may have higher multiplier effects. If the Agri CP Tool reaches the level of adoption that the Client Protection Pathway achieved in microfinance, it would de-risk the entire smallholder agricultural finance asset class, benefiting every TA provider and investor operating in the space. This represents a qualitatively different use of TA funding, one focused on building public goods rather than supporting individual transactions.

4.4 THE LACK OF INCENTIVES TO COLLABORATE

Structural incentives affect provider behavior in ways that may not optimize ecosystem outcomes. Current funding structures create specific dynamics that limit coordination. As one provider explained, "Our contract specifies numbers we must hit, so we compete rather than refer." Short funding cycles of 18 to 24 months prevent long-term partnership development. Competitive dynamics for the same donor funding limit information sharing, even when collaboration would better serve SMEs.

These difficulties are symptomatic of broader ecosystem challenges. The TA ecosystem lacks incentives to create common resources or shared infrastructure outside of networked structures. Interviews revealed little to no incentive to share lists of TA providers, such as contact information, service type, or quality assessments. Knowledge remains mostly within the scope of the TA organization and its network, limiting opportunities for coordination that could increase efficiency. Tools often supported with public money often remain proprietary, limiting replication and progress.

Some collaborative initiatives exist but are limited to long-standing partnerships. Multiple TA organizations in specific networks reported that they do share internal TA provider databases and draw lessons learned on program efficiency, but these remain available only to network partner organizations. Interviews also revealed that knowledge components of TA programs are not allocated priority funding, making the creation or maintenance of public databases extremely difficult. In the following case study, we examine the Smallholder SustaiNability Upscaling Programme (SSNUP), a sponsorship model that reduces ecosystem fragmentation (Box 5).

Box 5. Smallholder SustaiNability Upscaling Programme (SSNUP)—coordination through a trusted intermediary

The Smallholder SustaiNability Upscaling Programme (SSNUP) co-finances TA projects with impact investors to strengthen smallholder farmers and agricultural value chains in the Global South. Coordinated by the Luxembourgish NGO Appui au Développement Autonome (ADA), the USD 40 million, 10-year donor-funded program addresses a persistent problem: TA providers rarely coordinate because doing so requires sharing pipeline information, exposing competitive intelligence.

SSNUP's solution is structural rather than behavioral. As program coordinator and co-financier, ADA acts as a trusted intermediary that manages verification without requiring providers to expose their pipelines to each other. When a new TA project enters the pipeline or a proposal is submitted, the SSNUP team conducts a systematic check to identify whether similar initiatives are already being implemented or planned with the same organization. If overlap is found, the team shares the relevant project factsheet and facilitates direct coordination between the investors concerned, typically through a call to align scope and timelines. All approved projects are publicly listed on the program's website with a search function, allowing investors to proactively check ongoing activities.

The mechanism works. In one case, two project proposals were received within weeks of each other for an agricultural SME in Kenya, with nearly identical activities, submitted by two different investors. The SSNUP team identified this overlap at the ideation stage, before full design was completed. A simple email exchange was enough to detect the duplication. Following discussions between the two investors and the SME, one investor decided not to proceed while the other realigned its activities.

SSNUP also coordinates at the service provider level through a shared consultant database accessible to partner investors. The searchable platform lists service providers by country, support category, and role in SSNUP projects, alongside post-project ratings from both investors and beneficiary organizations. In practice, it functions as a curated peer-review tool for TA providers, helping investors save time and access practical recommendations.

In its first phase (2020-2025), 227 organizations received USD 11.7 million in technical assistance funding while simultaneously raising close to USD 280 million in investment, a leverage ratio of roughly 24:1. The co-financing model also makes less cost-effective but more impactful projects viable by reducing per-financier costs.

The model requires specific conditions: a trusted, neutral coordinator; a collaborative investor community willing to share information; a sufficient density of active partners and ongoing projects; and adequate time to build the relationships and trust that underpin information sharing. Digital infrastructure that makes project information accessible while protecting sensitive data is also essential.

SSNUP's experience suggests that solving the collaboration problem does not require providers to change their competitive behavior. It requires infrastructure that makes coordination possible alongside that behavior. This points to a deeper question about why duplication persists. Impact investors routinely coordinate on investments: before committing capital, they request information about other investors involved with an organization. They could apply the same logic to TA, identifying other providers and the topics they cover to avoid overlap. The challenge is that TA is generally not managed with the same risk discipline as investments. It is considered less risky, or not risky at all. This perception gap, not competitive secrecy, may be the more fundamental barrier to coordination.

5. RECOMMENDATIONS FOR ECOSYSTEM EFFICIENCY

Our mapping reveals specific gaps and patterns that enable different stakeholders to make better-informed decisions about their engagement in the TA ecosystem. This section draws on what TA organizations report works in specific contexts, what our analysis reveals about current allocation patterns, and where structural incentives may need adjustment. It translates these into actionable implications for funders, providers, and investors.

Interviews with TA experts reveal that coordination succeeds under specific, often relationship-dependent, conditions. Geographic proximity in hub markets facilitates informal coordination. Linked models with investment pathways create clear progression, such as Acumen Fellows to Trellis to Acumen Resilient Agriculture Fund (ARAF), or SNV to Dutch Fund for Climate and Development (DFCD). Milestone-based TA combined with grants, such as the USAID-WFP model that pairs TA with financing tied to achievement of specific milestones, aligns incentives across the support journey.

Practitioners also identified what is missing. They seek shared visibility into which SMEs are served and where, enabling referrals without duplicating intake processes. Common frameworks for assessing SME stage and support needs would facilitate handoffs between providers. Coordinated application timelines would enable SMEs to sequence programs rather than juggle competing deadlines. Greater investor transparency about specific requirements, particularly around climate, nature, and gender metrics, would help providers prepare SMEs appropriately. Longer funding cycles of three to five years, rather than 18 to 24 months, would enable sustained partnerships and reduce the constant churn of program redesign.

We identify four areas where coordinated action could materially improve ecosystem function, building on the case studies in the previous section.

- Neutral brokering, which enables shared infrastructure
- Shared infrastructure, which reduces coordination costs
- Lower coordination costs, which make pre-investment TA more viable
- Viable pre-investment models to create demand for national providers in frontier markets.

For each opportunity, we outline specific actions in Table 5 that different stakeholders can take, examples from existing practice, and the enabling conditions required.

Table 5. Opportunities to improve coordination and effectiveness in the TA ecosystem

Opportunity	Challenge addressed	Specific actions	Enabling conditions
Establish independent brokering and coordination	The ecosystem is fragmented with few coordination mechanisms between competing providers.	**Donor consortia** could fund or establish neutral intermediaries that verify overlap, facilitate referrals, and manage coordination without requiring providers to expose competitive intelligence directly, and adjust funding KPIs accordingly. **Funders operating in the same geography** could mandate coordination as a condition of funding, requiring grantees to participate in a registry of activities to reduce hub-market duplication. **TA provider networks** could designate a neutral broker to facilitate knowledge sharing, particularly around proprietary tools and frameworks developed with public funding. Adoption of shared frameworks will likely require donor mandates, since competitive dynamics discourage voluntary sharing.	A trusted, neutral coordinator with no competing TA delivery mandate. Willingness from funders to allocate grant resources to coordination infrastructure, not only for direct service delivery. Sufficient density of active partners within a geography or value chain to justify coordination overhead.
Build shared information infrastructure	SMEs cycle through multiple programs offering similar services because they cannot identify which provider matches their needs. Funders duplicate allocations because they lack visibility into other support around target enterprises. Providers cannot identify complementary organizations beyond their immediate networks.	**Donors and coordinating bodies** could fund shared databases that track which SMEs receive support from whom, and of what kind. SSNUP's searchable consultant database (listing providers by country and category with post-project ratings) provides a working proof of concept. **TA provider networks** could develop compatible (not identical) impact assessment frameworks. The goal is not a single universal metric but a common baseline that reduces reporting burden on SMEs while allowing flexibility for context-appropriate indicators. The IDH-Cerise+SPTF Agri Client Protection Tool (Box 4) offers one model: core principles with contextual filters, iterated through practitioner communities. **Regional platforms** could coordinate application and reporting timelines, enabling SMEs to sequence programs rather than juggle competing deadlines.	Funders must allow grant funds for ecosystem infrastructure, not just direct service delivery. Technology platforms must be maintained beyond initial grant periods, requiring sustainable funding models rather than one-off project budgets. Providers need incentives to share information. SSNUP's experience shows coordination prevents waste; longer funding cycles enable the trust-building required to make sharing work.

Opportunity	Challenge addressed	Specific actions	Enabling conditions
Address the pre-investment funding gap through dedicated facilities	Post-investment bias persists across delivery models. Post-investment TA can be built into fund management fees; pre-investment TA lacks a viable funding model. Promising SMEs are filtered out before reaching scale because they are too mature for grants but not ready for commercial capital.	**DFIs and donors** could fund standalone pre-investment facilities (reVive Hub model) with explicit mandates to build a pipeline without guaranteed investment outcomes. **Fund managers** could advocate for "preparation capital" carved from main funds for 18-24 month pre-investment TA. This may reduce deployable capital but improve deal quality. The ARAF model (Acumen) pairs investment capital with grant-funded TA for activities early-stage companies cannot afford. **TA providers** could experiment with milestone-based TA-plus-grant combinations (USAID-WFP model) that tie funding to SME progress, creating accountability without requiring a committed investor.	Realistic timelines for investment readiness. Patient capital that is willing to accept lower conversion rates than post-investment TA. A shift in donor impact narratives from pure financial sustainability toward valuing pipeline development and evidence building as legitimate outcomes.
Prioritize national provider visibility and frontier market development	Only 15 national TA organizations were identified despite their critical role. Hub-market concentration driven partly by the need to demonstrate results: TA in markets without investment vehicles cannot convert to deals, weakening reported success rates.	**International providers** could systematically map local contractors and partners they work with, making these networks visible to other ecosystem actors. **Chambers of commerce and industry associations** could maintain national provider registries to reduce the discovery burden. **Country-level donor coordination** (AMEA/SSNUP model) could fund systematic mapping of national TA ecosystems aligned with sector transformation plans. **Investors** could transparently share specific requirements (particularly climate, nature, and gender metrics) so providers can prepare SMEs appropriately. GIZ's CATAL1.5T program provides one model for structured investor-provider collaboration. **TA providers working in frontier markets** should pair scouting with assessment of investment ecosystem maturity. In some markets, the primary TA objective should be business strengthening and resilience rather than near-term investment readiness.	Funding for knowledge management, not just service delivery. Recognition that national providers may have limited online presence but strong local networks. Discovery requires working through local intermediaries, not online mapping. Longer funding cycles that enable relationship-building. Budgets that include outreach costs, not just service delivery. Willingness from providers to refer non-fits rather than serve everyone.

6. CONCLUSION

This research began with a practical question: which organizations provide technical assistance to agribusinesses, and where? We identified over 200 organizations operating across sub-Saharan Africa and Latin America and discovered not a shortage of support but a lack of visibility. This opacity drives duplication in hub markets and gaps in frontier regions, prevents providers from coordinating even when they share objectives, and concentrates support among established enterprises while leaving equally promising but less visible SMEs without access.

On top of this opacity problem, our research also identifies three additional challenges constraining ecosystem function: a pre-investment funding gap, a tension between standardization and contextualization, and a lack of incentives to collaborate. Addressing them requires acknowledging trade-offs between efficiency and effectiveness, scale and customization, and financial sustainability and developmental impact.

This mapping provides a starting point for more systematic decision-making, that could aim to address these issues. Funders can assess whether their portfolios create duplication or leave gaps. Providers can identify complementary organizations and consider coordination opportunities. Investors can locate TA partnerships in target geographies. The database accompanying this report is designed to be built upon and updated as the ecosystem evolves.

What this research cannot do is prescribe universal solutions. The TA ecosystem's diversity reflects genuine complexity in serving SMEs across varied geographies, sectors, stages, and contexts. Improvements will emerge from many actors taking actions suited to their context-, rather than from a unified blueprint. What it can do is make the case that investing in coordination infrastructure, including neutral brokers, shared databases, national provider visibility, and dedicated pre-investment facilities, represents a qualitatively different and potentially high-multiplier use of TA funding, one focused on strengthening the ecosystem rather than adding to an already fragmented supply.

Future research should prioritize: country-level and value chain-focused deep dives that surface national providers invisible to desk research; verification of specialized capabilities beyond public positioning; systematic tracking of TA outcomes linking support to investment success; and analysis of what drives geographic concentration and how frontier-market TA can be made viable alongside development of appropriate investment vehicles.

ANNEXES

ANNEX 1 – DEFINITIONS AND FRAMEWORKS

ANNEX 1.1 GLOSSARY OF KEY TERMS

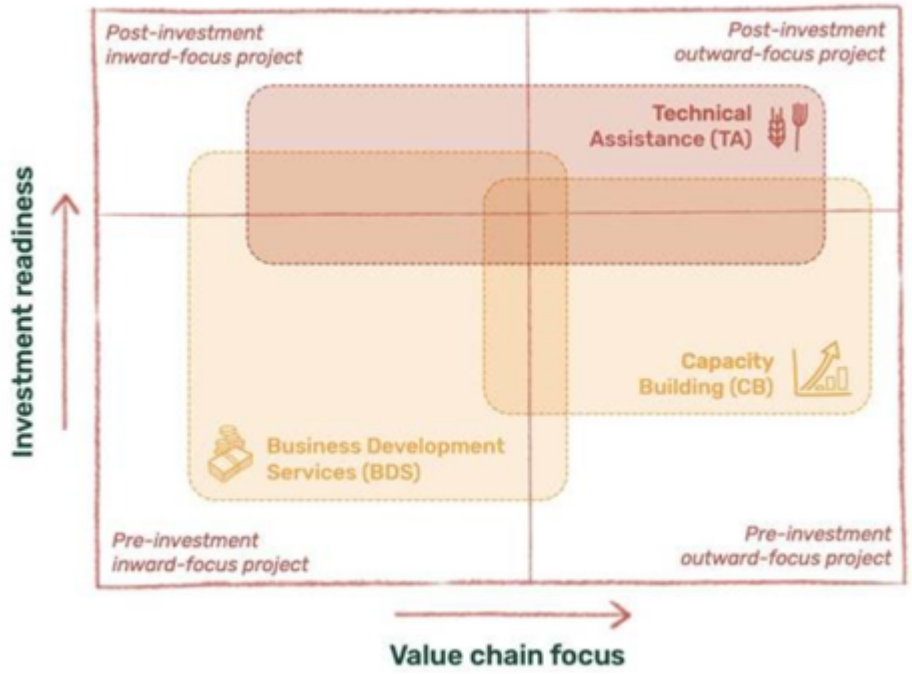
Category	Term	Definition
Agrifood actors	Agri-SMEs	Profit-oriented small and medium-sized enterprises (SMEs) that are involved in the agricultural value chain, either directly or by providing enabling services to value chain actors. They are composed of 5 to 250 employees, with an annual turnover of USD 100k to 5M. Six archetypes of agri-SMEs exist depending on their growth potential and ambition (ISF advisors & SAFIN 2021). Microenterprises, which are smaller and usually more informal, are sometimes added to the acronym MSMEs representing the broader universe of agribusinesses.
	Smallholder farmers	Farmers who manage small areas of land (farms of less than 2 to 5 -10 hectares depending on definitions) at the household level, for both family subsistence and commerce, and they rely primarily on family labor. Globally, about 285 million smallholder farming households produce 30% of the world's food (ISF Advisors 2025) (FAO 2013) (CPI 2023).
Agrifood finance	Finance gap	IFC estimated a finance gap for MSMEs of USD 5.65 trillion globally, and USD 930 billion in low- and middle-income countries in 2019 (IFC 2025). Agri-SMEs in LAC, SEA, and SSA face a finance gap estimated at USD 230 billion annually (ISF advisors 2022).
	Missing middle	Popularized by IFC and ANDE, the missing middle refers to MSMEs in underserved markets looking to fundraise between USD 20,000-50,000 and 2 million. They face specific financing barriers as they are perceived as too big for microfinance and too small for private equity. AGRA coined the term "hidden middle" in 2019 to highlight the critical role of agri-SMEs in growing markets and their concurrent lack of access to finance and supporting services (ISF advisors 2022; Collaborative for Frontier Finance 2018).
	Investment readiness	The ability of an SME to meet criteria set by investors for receiving investment, including its economic strength (financial health, governance structure, and business plan), and the alignment between fundraising needs and investors' expectations (ticket sizes, growth profile, risk/return ratio). An SME might have a strong economic profile, but it will only become investment-ready in the eyes of the investors who will consider an investment based on their capital availability.
	Investibility	The attractiveness of an SME, based on its specific characteristics, to generate commercial financial returns while reducing risks. In practice, what is investable or bankable depends on the investor profile (mandate, risk aversion, returns expected).
	Pre-investment stage	Stage of development of an agri-SME before receiving commercial capital, typically around pre-seed and seed investment rounds. Pre-investment TA can enhance investment readiness and facilitate commercial and private investments. Post-investment TA is typically provisioned alongside financing to maximize its value.

Category	Term	Definition
Acceleration support	**Technical assistance (TA)**	Specialized advisory service targeting identified gaps to bridge current SMEs' capabilities and what investors or markets require, delivered over a defined timeframe and including material and non-material support. TA can be bundled with financing and is provided to SMEs to ultimately mobilize finance. Taken more broadly, TA can apply to other beneficiary groups to address capacity and technical gaps, including farmers, intermediaries, financial institutions, and governments (Tameo 2023).
	Business development services (BDS)	Non-financial services meant to help SMEs tackle obstacles more effectively, speed up growth, and achieve greater scale. These services include acceleration, incubation, technical assistance, coaching, consulting, and other forms of non-financial support (ISF Advisors 2023).
	Capacity building (CB)	Non-financial services that enhance technical capacities, skills, resources, and knowledge of SMEs or their stakeholders to help them perform more effectively. It is often more focused on smallholder farmers (Tameo 2023).
	Cohort model	TA programs delivered to a group of selected beneficiary organizations during a defined period of time. They typically offer standardized services and select the beneficiary organizations through an open application process.
TA organizations	**TA provider**	Organizations providing direct or indirect TA services to end beneficiaries. They can be specialized private or public entities, consulting firms, independent consultants, non-profit organizations, investment firms, development finance institutions, and can themselves subcontract other TA providers.
	TA facilitator	Donors, sponsors, investors, fund managers, scientific bodies, networks, and chambers of commerce/industry associations that partner with TA providers by financing, supporting, coordinating, or implementing TA projects and programs.
	Global or international TA organization	Organizations based in developed regions and operating in EMDEs (e.g. UK > Kenya)
	Regional TA organization	Organizations based and operating in one EMDE region (e.g. Kenya > East Africa)
	Domestic, local, or national TA organization	Organizations based and operating in one country (e.g. Kenya > Kenya)

ANNEX 1.2 DEFINING TECHNICAL ASSISTANCE

Technical assistance is complex to define and often refers to business development services and capacity building. Because TA can take several shapes, for instance, the provision of non-material and material services, delivered independently or linked to investment strategies, and across varying periods of time, the term can refer to different types of support. Interviews with impact investors from SSNUP and CSAF reveal that in practice, the term "technical assistance" is often used interchangeably with other terms, such as capacity building (CB) or business development services (BDS) as shown in Figure A1.1, while the investment readiness focus and beneficiaries of the services vary (Tameo 2023). Many programs call themselves technical assistance but overlap with coaching, incubation, or even market linkage facilitation.

Figure A1.1: Illustration of overlaps and differences amongst CB, BDS and TA



Source: Tameo 2023

Various frameworks classifying TA services emerged to help navigate the complex TA ecosystem. While each offers valuable insights, they reflect different analytical priorities and use cases.

The Technoserve taxonomy is the most widely used in the agri-SME space. It was developed in 2019 based on the TA facilities of DFIs in Africa and proposes four TA categories, based on the service's strategic orientation - Core Business, Inclusive Business, Value Chain Development, and Market Systems Development. The latter overlaps the three other types of services.

Other taxonomies have emerged which aim to have a broader application. In particular, ADA and SSNUP created a new framework (Tameo 2023) described as more applicable to impact investors. While it reuses some elements of the Technoserve taxonomy, this new approach has a two-dimensional typology based on the investment readiness of the beneficiary organization and the intervention's focus within the value chain. The four TA categories are: management systems improvement, market access and development, financial services, and capacity building to end beneficiaries.

This approach echoes the three levels of TA identified by IDH and AGRA (Enclude 2017) which are targeted at: 1) the individual smallholder farmer (e.g. extension services, financial literacy training), 2) the organization (e.g. core business support to an SME or farmer organization, inclusive business support to enterprises working with outgrowers, a financial institution moving into agricultural lending), 3) the enabling environment level (e.g. policies and regulations).

Research from the Agri-SME Learning Collective (ASLC) and ISF Advisors uses BDS and TA interchangeably, yet both organizations adopt different definitional scopes. Building on Technoserve and SSNUP work, the ASCL segmented BDS services based on the level of management capacities of SMEs (ASCL 2025). ISF Advisors adopts a broader approach to BDS, defined as non-financial services meant to help SMEs tackle obstacles more effectively, speed up growth and achieve greater scale, including acceleration, incubation, technical assistance, coaching, consulting, and other forms of non-financial support (ISF Advisors 2023).

Table A1.2. Common Gaps addressed by TA

Barrier name/category	Description of barrier	How technical assistance addresses this barrier
Weak financial management and record-keeping	Agri-SMEs often lack formal accounting systems, audited financial statements, or consistent financial records, making it difficult for investors to assess creditworthiness and performance	TA providers work with SMEs to implement accounting software, train staff on financial management practices, and prepare investor-ready financial documentation, including balance sheets, cash flow projections, and historical performance data
Limited business planning capacity	Many agri-SMEs operate without formal business plans, growth strategies, or market analysis, making it hard to demonstrate viability to investors	TA supports SMEs in developing comprehensive business plans, conducting market assessments, defining growth strategies, and creating financial models that demonstrate return potential to investors
Inadequate governance structures	Informal governance, unclear ownership structures, and weak internal controls create risk concerns for investors	TA helps establish formal governance frameworks, clarify shareholder agreements, set up board structures, and implement internal control systems that meet investor requirements
Lack of understanding of investor requirements	SMEs often do not know what information investors need or how to position themselves for investment	TA providers bridge this gap by improving SMEs' knowledge of investor expectations, helping prepare pitch materials, and conducting mock due diligence exercises
Limited financial access	SMEs lack access to financial markets due to internal gaps and market failures, such as perceived risks and high transaction costs	TA can support with credit scoring, aggregation to attract larger funding streams, introductions to potential investors and grant funders, and carbon market access
Insufficient technical capacity in production or operations	Operational inefficiencies, outdated production methods, or quality control issues limit profitability and scalability	TA delivers sector-specific technical and agronomic support to improve production efficiency, sustainability, quality standards, and optimize supply chain operations, including through scientific partnerships
Limited market access and offtake agreements	Without reliable buyers or market channels, SMEs struggle to demonstrate stable revenue streams to investors	TA helps SMEs identify market opportunities, negotiate offtake agreements, develop marketing strategies, and connect with buyers to secure predictable revenue
ESG gaps	Failure to highlight assessments of climate, gender and nature risks and impacts can disqualify SMEs from investors with ESG requirements	TA supports SMEs in conducting risk and impact assessments, and developing monitoring systems to meet investor criteria (e.g., compliance with EUDR, gender inclusion policies)
Regional disparities	Different regions may face different barriers from macro risks, limited track records, currency volatility, corruption risks, etc.	TA can deliver more intensive and tailored financial/ governance support in high-risk regions, such as additional data on financial budgeting or ESG certifications

ANNEX 2 – METHODOLOGY

ANNEX 2.1 DATA COLLECTION

Our data collection methodology followed a three-tiered approach as shown in Figure 2 of Section 2.1. Details are provided below:

- **Step 1**: The list of 207 TA organizations was compiled using a combination of public information and internal knowledge. Specifically, we used research from the CABI database, literature, internal knowledge, and expert referrals. We prioritized TA organizations primarily targeting agri-SMEs, excluding those that focus solely on farmers and local financial institutions. We also prioritized players active in SSA and LAC, excluding providers exclusively focused on developed economies and SEA.
- **Step 2:** We narrowed down the list of 207 organizations to a smaller subset of 30 that have climate-focused TA activities. We selected the ones whose activities, models, and approaches are most relevant to the CLIC's Connector, based on a ranking methodology using the following criteria: alignment with the CLIC's Connector mandate, strategic learning value, active role in market intelligence, focus on the climate nexus with gender and nature, geographic focus on SSA and LAC, and availability of public information. We also incorporated feedback from the experts interviewed to refine the list.
- **Step 3:** From the sample of 30 organizations we selected 3 whose models appeared outstanding during the industry expert interview phase and with a willingness to share detailed information. Additional information was collected during further in-depth research and dedicated interviews.

For all three steps, data was collected from publicly available information, including website descriptions, program materials, annual reports, and case studies, supplemented by interviews where possible.

The table below details the input data fields collected for the quantitative steps 1 and 2. The geographic data (HQ country and country focus) was used to perform the geographic analysis (both at the country and region levels) and define organizations as global, regional, or domestic (see definitions in Annex 1.a. Glossary). The type of TA service (generic) refers to the categories of Technoserve's typology; however, we have not mapped the Market Systems Development category, which overlaps with the three others, as it was difficult to attribute from desktop research.

Table A2.1. Data fields collected in the database

Data fields	Entries	Step 1	Step 2
Type of TA services (generic)	Core Business Support, Inclusive Business Model Support, Value Chain Development	✓	✓
TA Services provided (specific)	Business Model Support, Financial Planning Strategy, Legal / Compliance & Certification, Impact Assessment & Measurement, Investment Facilitation, Investment Readiness, Digital Transformation / Technology Adoption, HR & Team Capacity, Farmer Training / Sourcing Model Design	✓	✓
HQ country	Country	✓	✓

Data fields	Entries	Step 1	Step 2
Country focus	Country(ies)	✓	✓
Organization type	Intergovernmental Organization, DFI / Donor TA Facility, NGO and/or Non-Profit, Impact Investor with TA Facility, Consulting and/or Advisory Firm (For Profit/Ltd/LLC), Accelerator and/or Incubator, Government Agency, Alliance/ Association, Financial Institution/Bank, Solopreneur/Individual Consultant, Research Institution	✓	✓
Governance model	Independent, Linked, Integrated		✓
Average duration	Below 6 months, Between 6 and 12 months, 12 months and beyond		✓
M&E / Feedback mechanisms	Yes, No		✓
Public results or reports	Yes, No		✓
Strategic impact focus	Climate, Gender, Nature		✓
Customization	Standardized, Customized, Fully tailored		✓
Agri-SME focus	Yes, No		✓
Direct smallholder/ Farmer support	Yes, No		✓
Delivery modality	Online, Hybrid, In-person		✓
Timing in investment lifecycle	Pre-investment, Pre- and post- investment, Post-investment		✓
Public theory of change	Yes, No		✓
Role in TA delivery	Provider, Facilitator		✓

ANNEX 2.2 INTERVIEWS

We conducted semi-structured interviews with 13 organizations between October 2025 and January 2026, of 30 minutes up to one hour. Questions centered around industry challenges such as coordination, duplication, and effectiveness of TA delivery.

Table A2.2. List of experts interviewed

Organization	Individual(s) and role(s)
Acumen	Christopher Wayne, Director of Agriculture
ADA	Mathilde Bauwin, Head of Knowledge Management Caroline Morilhat, SSNUP Coordination team Laeticia Glasser, SSNUP Knowledge Management team Eric Thomas, SSNUP Coordination team

Organization	Individual(s) and role(s)
AMEA	Mark Blackett, Network Director
ANDE	Laura Simmons-Stern, Climate Manager
CABI	Alvaro Verde, Policy & Engagement Advisor
CSAF	Andrea Zinn, Director Eda Dokle, Data and Learning Manager
IDH	Dagmar Mooij, Senior Program Manager (IDH Invest) Thomas Kockmeyer, Impact and Learning Advisor (IDH Investment Management) Pilar Jimenez, Lead of the IDH reVive Hub in Colombia (IDH Invest)
IFAD	Manzi Nadine Umunyane, Senior Investment Officer – Private sector
ISF Advisors	Dan Zook, Executive Director
Prospero	Mutumboi Mundia, CEO Giulia Praolini, Head of Programmes and Business Development Sibong'ile Banda, Programmes Officer Chitalu Malulu, Planning and Strategy Associate
Small Foundation	Gerard Wynne, Senior Investment Executive
SNV	Peter Boonman, Global Technical Advisor of Financial Innovation Koen Peters, Business Development Officer
Technoserve	Ana Herrera, Director of Inclusive Investment and Team Lead of the CASA Technical Assistance Facility

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