ANALYSIS OF TRENDS IN CLIMATE FINANCE FOR AFOLU IN THE SAHEL AND HORN OF AFRICA 2010 - 2022

November 2024

TREEAID

Alliance Bioversity & CIAT

CGIAR INITIATIVE ON Climate Resilience

About Tree Aid

Tree Aid is a charity working with communities in the drylands of Africa – particularly in the Sahel - to tackle poverty and the effects of the climate crisis.

About CGIAR

CGIAR is a global research partnership for a food-secure future dedicated to transforming food, land, and water systems in a climate crisis.

About the Alliance of Biodiversity & CIAT

The Alliance of Bioversity International and CIAT delivers research-based solutions that harness agricultural biodiversity and sustainably transform food systems to improve people's lives in a climate crisis.

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INTRODUCTION

African nations, despite minimal contributions to the climate crisis, disproportionately bear its socio-economic costs. The Agriculture, Forestry and Other Land Use (AFLOU) sector, the backbone of these nations' economies is significantly comprised of natural resource-dependent subsistence farming and pastoralism, which serves as the main livelihood for an estimated 268 million people (FAO,2018), making it extremely vulnerable to climate change, causing detrimental impacts on both food security and socio-economic stability.

In the Horn of Africa, severe climate impacts have intensified over recent years. Between 2019-2020, several areas of Ethiopia, Somalia, Kenya and Uganda faced food insecurity due to floods and a locust outbreak following consecutive low rainfall that caused substantial crop failure in the region (WMO, 2019).

Elsewhere on the continent, the Sahel region and the surrounding dryland ecosystem, is one of the most vulnerable areas to the impacts of climate change globally. Where communities on the front lines of the climate crisis are facing the shocks of climate change and poverty. In 2023 the combined effects of climate change and conflict left 6.3 million people food insecure, with over 150 million people on the continent struggling without the food they need. Projections show that by 2050, climate shocks may send an additional 13.5 million people into poverty.

According to Supporting Pastoralism and Agriculture in Recurrent and Protracted Crises (SPARC), climate finance needs for countries of the West African Economic and Monetary Union (WAEMU) alone, amount to $7.9 billion annually, representing 35.5% of West Africa's needs and 3.2% across the continent. However, analysis showed that climate finance flows to the WAEMU region only reached $3.5 billion in 2020, leaving a wide finance gap yet to be filled (SPARC, 2023).

With COP29 on the NCQG and beyond, it's important to keep into focus the climate finance needs for African regions of the Sahel and the Horn of Africa. The AFOLU sectors do not receive adequate financing for securing and sustaining livelihoods. There is currently limited data analysis on the financial flows to countries of the Sahel and Horn of Africa. In order to influence policy change on climate finance this report lays out country by country analysis on the current state of play in these regions, through identifying:

- The extent of climate finance flows to the Sahel (with a particular focus on Great Green Wall countries) and Horn of Africa, including comparing financial flows of climate finance vs. commitments for agriculture and nature in the Sahel and Horn of Africa and,
- The extent to which climate finance reaches the local and community level in the Sahel and Horn of Africa.

METHODOLOGY AND DATA LIMITATIONS

Structure of the report and country sections

This report presents the findings of our analysis of climate-related development finance to 15 countries located in the Sahel, Horn of Africa, and East Africa. The countries covered in the report are: Burkina Faso; Chad; Djibouti; Eritrea; Ethiopia; Kenya; Mali; Mauritania; Niger; Nigeria; Senegal; Somalia; South Sudan; Sudan; and Uganda.

The findings are presented across 16 chapters. The first chapter presents analysis at regional level – including a review of literature on regional climate finance needs, aggregated climate finance needs for AFOLU (based on the finance needs identified in the Nationally Determined Contributions for all 15 countries), and analysis of the OECD DAC data on climate finance allocated to AFOLU in this group of countries.

There is then an individual section analysing AFOLU-related climate finance needs and recent finance flows in each of the 15 countries.

Each of the country chapters follows a similar format, and is broken up into four sub-sections with the following titles.

1. Overview of adaptation needs and mitigation targets in the AFOLU sector and associated climate finance needs.
2. Analysis of climate finance flows (2010 – 2022)
3. Analysis of projects funded by the three main providers of climate finance between 2010-2022.
4. Conclusion

The methodology, sources of data, and any associated data issues used to develop each of these sub-sections is outlined below.

1. Overview of adaptation needs and mitigation targets in the AFOLU sector and associated climate finance needs

For each of the 15 countries, we reviewed Nationally Determined Contributions (NDCs) and – for the countries where they had been published – National Adaptation Plans (NAPs). For each of these documents we took the most recent versions that had been published on the UNFCCC NDC and NAP registry at the time the research was undertaken (September 2024 – October 2024). The adaptation and mitigation targets for each country were summarised in a table, which also provided a breakdown of the associated climate finance needs for the AFOLU sector.

In instances where the NDCs and NAPs did not provide a breakdown of finance needs by sector, the total finance needs across all sectors were listed (with a breakdown or adaptation and mitigation costs, where available). In most of these instances, we have noted that the adaptation finance needs for a given country are likely to account for a significant proportion of these, given the vulnerability of agriculture to climate impacts, and the importance of the sector to the economy (both in terms of employment and GDP).

For the regional analysis chapter, the climate finance needs for the AFOLU sector were calculated as the sum of all the individual country needs outlined in their respective NDCs and NAPs. Additionally, we have used projections from recent publications which analyse the climate finance landscape in Africa. Examples include Climate Policy Initiative's Landscape of Climate Finance of Climate Finance in Africa (2024) and Landscape of Finance for Agrifood Systems (2023). A full list of publications that were used to inform this analysis are provided in the references section.

2. Analysis of climate finance flows (2010 – 2022)

Within this section we analysed country-level data on climate-related development finance as reported in the OECD DAC database on climate-related development finance. The OECD-DAC database tracks public sources of climate-related development finance – including from both bilateral and multilateral sources, as well as private philanthropy from large donors.

For this analysis, we reviewed data on funding allocations made between 2010 and 2022. The rationale for selecting this period is as follows. 2010 is the first full year after the 15th UN Climate Conference (COP 15) in Copenhagen, during which developed countries committed to providing USD 100 billion annually in climate finance by 2020 to help developing countries respond to, and mitigate the effects of, climate change. 2022 is the most recent full year for which the OECD has reported on climate-related development finance flows (the OECD DAC has not yet published data on climate-related development finance for 2023 and 2024). This period was used for 14 out of the 15 countries. The exception was South Sudan, which was only recognised as an independent state on 9th July 2011. For this reason, we analysed data on South Sudan in the OECD DAC database, for the period 2011 – 2022.

It Is Important to note that our analysis in this report focuses on climate finance for AFOLU related activities in the region. The OECD DAC database captures climate-related development finance flows that span multiple sectors. Prior to doing the analysis, we had to make a decision on which of the sector and sub-sector descriptions that are used in the OECD-DAC database should be included within the parameters used to capture total AFOLU-related climate finance flows. There were some challenges here that are important to highlight. In particular, the sector and sub-sector descriptions often do not provide enough clarity on what proportion of funding under a certain entry are AFOLU related. For example, in the case of the transport sector, it is not possible to determine from the OECD DAC database what proportion of entries are relevant to AFOLU. It is likely that a certain proportion of overall transport sector funding has benefits to the AFOLU sector (for example project funding for the construction of roads or railways may have indirect benefits to agricultural communities), however there is currently no agreed way to decouple the AFOLU related elements from the broader focus of such projects.

We made the decision to take a conservative approach to our selection of sector and sub-sector descriptions, and included descriptions that had a clear link to agriculture, forestry and other land use.

Additionally, many of the entries in the OECD DAC database are funding allocation for regional projects and programmes. Examples of regional descriptions used in the OECD DAC

database include 'Africa' and 'South of the Sahara'. There is however, no way to determine whether any of the 15 countries our analysis focuses on are included in these projects and programmes, or what proportion of the allocated funding is relevant to the group of countries under consideration. Consequently, we were unable to include such entries in our analysis. For these reasons, the figures we arrive at on AFOLU-related climate. finance flows to these countries may be lower than alternative sources.

The remainder of this sub-section outlines how we approached calculating different elements of climate-related development finance, for each of the 15 countries and at regional level (all 15 countries).

Total climate finance – For each country we provide an aggregate of total AFOLU-related funding for each year. Comment is provided on any noticeable trends in year-on-year funding from 2010 – 2022.

Share of climate finance by instrument – In each section Figure 1 presents (in the form of a pie chart) the breakdown of total climate related development finance (over the whole period) by instrument. Figure 2 then illustrates (in the form of a bar chart) the year-by-year distribution of funding by instrument. We then describe any trends (such as increases in debt-related instruments as a share of total funding over time).

In almost all cases, the majority of funding to all 15 countries is provided as either grants or debt-related instruments. There is very little funding provided as equity (with the only exception being a single equity investment in Kenya (in 2021). The limited share of equity-based instruments is consistent with other studies on climate finance flows to the region. Equity funding is typically scarce in the AFOLU sectors of fragile and low-income countries.

A data limitation which is of relevance here, is that the OECD DAC database does not provide sufficient detail on the level of concessionality of debt-related instruments. It is thus difficult to determine at face value whether the funding is affordable to the respective countries, and how significantly it is adding to their debt burdens.

Share of funding by use – adaptation / mitigation / cross-cutting – in each chapter, Figure 3 shows the breakdown of funding allocated to adaptation, mitigation, and cross-cutting (dual benefit) activities in the relevant country. This is presented as a pie chart, which shows the respective share as a percentage of total AFOLU-related funding in the given period (2010 – 2022). We also provide analysis in the text about how much funding is going to each activity on a year-by-year basis, and to what extent these shares align with the projected climate finance need for adaptation / mitigation / cross-cutting that are noted in the NDCs and NAPs for the relevant countries.

Per-capita funding to the population employed in agriculture – within our analysis for each country and across the fifteen countries, estimate how much funding is going on a per capita basis to individuals employed in the agriculture sector.

The rationale for presenting this information is to determine whether equitable funding is provide on an individual basis. Looking solely at the volume of funding can be misleading as certain countries on face-value receive a comparatively high overall volume of funding, but this does not account for the size of the population. For example, our analysis of the OECD DAC data shows that Nigeria receives a high total volume of climate finance for AFOLU activities when compared to other country totals, however when spread across the population, the per capita share is

comparatively low (Nigeria is consistently below the regional per capita averages year-on year). The methodology we used to estimate the per capita totals were as follows.

For each country, we used World Bank data to determine the total population and the percentage of the population employed in agriculture for each year between 2010 – 2022. Using these figures, we estimated the total number of people employed in agriculture in each year. We then divided the total allocated climate finance for AFOLU activities by the estimate agricultural workforce for the respective year.

To calculate the regional per-capita funding, for each year, we took the aggregate volume of climate-related development finance for AFOLU across all 15 countries, and divided it by the aggregate population employed in agriculture for all 15 countries.

For 14 out of 15 countries, *Figure 4* shows the how annual per capita AFOLU climate funding to population employed in agriculture compares with the regional average.

The only country for which we have not included this figure is Djibouti, this is because the figures for percentage of population employed in agriculture in Djibouti (as per the World Bank data) appear far too low. This has a knock-on effect on the per capita AFOLU allocations.

Extent that allocated funding considers gender inclusion – the OECD DAC database has a column that shows the significance of gender elements within a project. The descriptions available are: Principal; Significant; or Not Targeted. Some entries are left blank, indicating that the gender focus of the project was not specified.

For each country, we used a pivot table to determine the total volume of funding in the period 2010 – 2022 that was allocated to each of these descriptions. We then calculated this total as a percentage of all AFOLU funding to this country in the same period.

Main providers of funding – for each country we used a pivot table to calculate which institutions had allocated the most funding in the given period. Table 2 outlines the five largest providers of funding for each country. This captures the total funding allocated by each of the five institutions, and what share of the total funding allocated to the country (by all institutions) was in the given period.

Main recipients of funding - for each country we used a pivot table to calculate which institutions (or categories of institution) had received the most funding in the given period. In most cases, the main recipients were national government agencies, or public international institutions (multilateral and bilateral agencies) or international NGOs. These institutions are likely to be responsible for managing the disbursement of funding for the relevant project, however the OECD DAC database does not provide any clarity on how these recipients then divested the funding, and whether and to what extent it was reaching the local level.

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

Given some of the limitations of the OECD DAC database, in this section we present a more detailed review of the AFOLU funding provided by the main providers of finance for each country (as identified in the section above).

Additionally, for each country we also analyse climate finance support provided by the Green Climate Fund to each of the 15 countries. As noted above, the OECD DAC database does report on regional and multi-country project funding, however because there is no clear way to account for how much funding for such projects went to a specific country, these were not captured in our analysis of the OECD DAC data.

Across the 15 countries, a significant amount of funding allocated by the Green Climate Fund has come through multi-country programmes. Consequently, much of funding allocated by the GCF was unlikely to have been captured in our analysis of the OECD DAC data. However, given the importance of the GCF as a provider of climate finance to developing countries, we have decided to include it in our analysis in this section.

The methodology we used to estimate GCF funding allocated and disbursed for AFOLU projects in each country was as follows. For each country we reviewed the GCF project database and determined which projects or programmes were AFOLU relevant. We captured this information a spreadsheet (with details of each project / programme in a row). For each AFOLU related project / programme we captured the total GCF funding allocation (in USD), and then (where available) we captured the percentage of total GCF funding disbursed to date (as of mid-October 2024).

The GCF notes that for multi-country programmes, the GCF funding contributions should be assumed to allocated equally amongst the countries in the programme. Using this basis, we calculated the total GCF allocation per country and the total disbursement amount per country. We then were able to take these figures and calculate the total funding allocated and disbursed in each of the fifteen countries, and across the entire group of fifteen countries.

4. Conclusion

For each country and for the collective group of countries, we provide a summary of the findings and draw conclusions on the extent to which funding flows to the AFOLU sector are meeting the finance needs (as outlined in the NDCs and NAPs).

REGIONAL LEVEL: SAHEL AND HORN OF AFRICA

1. Overview of climate finance needs for AFOLU in the Sahel and Horn of Africa

Globally, the cost of food systems transformation is estimated to be between USD 300 billion – USD 350 billion annually between 2024 and 2050 (FOLU, 2019). At regional level, for Africa the estimates vary. A recent report by Climate Policy Initiative (CPI), estimates that annual financing needs for AFOLU in Africa are USD 7.8 billion for mitigation and a further USD 5 billion for adaptation[1].

CPI's analysis also finds that there is a significant gap – at regional level – between climate finance needs for the AFOLU sector and current flows. According to analysis by CPI in 2021/2022 African countries received a total of USD 7 billion in climate finance for AFOLU projects. Whilst this figure was up from a total of USD 4.6 billion in 2019/2020 (an increase of 51%)[2], it was still well below the total annual financing needs for AFOLU in the region.

As part of our analysis, we reviewed the Nationally Determined Contributions of all 15 countries in this study (using the most recent versions submitted to the UNFCC). Table 1 (below) shows a summary of finance needs for adaptation and mitigation interventions in the AFOLU sector.

Table 1. Projected climate finance needs for AFOLU investments needed for adaptation and mitigation – Sahel and Horn of Africa countries

Country	Est. Mitigation NDC Investment (USD bn by 2030)	Est. Adaptation NDC Investment (USD bn by 2030)	Minimum total AFOLU investment needs (USD billion) by 2030
Burkina Faso	USD 0.037 billion	USD 2.1 billion	USD 2.14 billion
Chad	USD 3.56 billion	USD 5.0 billion	USD 8.56 billion
Djibouti	Not specified	Not specified	Not specified
Eritrea	Not specified	USD 4.28 billion	USD 4.28 billion
Ethiopia	Not specified	Not specified	Not specified
Kenya	Not specified	Not specified	USD 7 billion
Mali	USD 1 billion	Not specified	USD 1 billion
Mauritania	USD 0.023 billion	USD 1.89 billion	USD 1.9 billion
Niger	Not specified	USD 6.74 billion	USD 6.74 billion
Nigeria	Not specified	Not specified	Not specified
Senegal	USD 1.18 billion	USD 1.3 billion	USD 2.48 billion
Somalia	USD 4.45 billion	USD 10.3 billion	USD 14.75 billion

1 Climate Policy Initiative (October 2024), Landscape of Climate Finance in Africa 2024
2 CPI (October 2024), Landscape of Climate Finance in Africa 2024

Country	Est. Mitigation NDC Investment (USD bn by 2030)	Est. Adaptation NDC Investment (USD bn by 2030)	Minimum total AFOLU investment needs (USD billion) by 2030
South Sudan	USD 5.39 billion	USD 0.24 billion	USD 5.63 billion
Sudan	USD 0.16 billion	USD 0.83 billion	USD 0.99 billion
Uganda	Not specified	Not specified	Not specified
TOTAL	**USD 15.8 billion**	**USD 32.68 billion**	**USD 55.47 billion**

Source: Analysis of Nationally Determined Contributions (NDCs) of respective countries (most recent versions submitted to the UNFCCC).

Our review of NDCs found that across the 15 countries, the total finance needs for AFOLU were USD 55.47 billion by 2030 – broken down into USD 15.8 billion for mitigation objectives and USD 32.68 billion for adaptation objectives. The discrepancy between the sum of mitigation and adaptation, and total finance needs is explained because we were able to find a total for overall AFOLU finance needs for Kenya, but no breakdown of costings between adaptation and mitigation in the AFOLU sector (hence values for Kenya could not be included in the totals for adaptation and mitigation, but they were included in the total finance needs column). It is important to note that these figures are likely to be highly conservative. Firstly, NDCs of four countries (Djibouti, Ethiopia, Nigeria, and Uganda) did not provide sector specific finance needs. It is likely that for these countries the funding needs for AFOLU are going to be significant, given the importance of the sector to the respective national economies (for instance, the total climate finance needs across all sectors noted in Ethiopia's NDC is USD 316 billion up to 2030, however as there was no estimates provided for AFOLU needs, we were unable to include any figures). Additionally, it is probably that across all countries funding needs are likely to be significantly higher, as NDC objectives may not adequately capture all national / regional needs. This is likely to be true for adaptation specifically, as NDCs are predominantly focused on mitigation objectives.

Many of the countries in the Sahel and Horn of Africa are low-income countries. For example, the G5 Sahel countries – which include Burkina Faso, Chad, Mali, Mauritania, and Niger – had an average GDP per capita of USD 790 in 2021 and 31% of the population fall below the poverty line. Three of these countries – Chad, Niger, and Mali, rank among the top seven most vulnerable countries to climate change[3].

Countries in the Sahel and Horn of Africa are expected to incur significant economic losses as a result of climate change impacts. Negative impacts are projected to increase over time and are expected to be more severe under more pessimistic climate scenarios. The burden of impacts are likely to fall disproportionately on the poor and most vulnerable communities. For example, in many countries in the region, women and girls are disproportionately affected by climate change due to gender-discriminatory practices and are often excluded from decision making (Oxfam, 2023). Consequently, substantial adaptation interventions are needed to reduce the negative impacts on growth and poverty, and these should be tailored to specific local needs and ensure inclusion of vulnerable groups.

All countries considered within this report are classified by the World Bank as

3 World Bank Group (2022), G5 Sahel Region Country Climate and Development Report.

being either low or lower-middle income countries. All 15 countries are currently eligible for support from the International Development Association (IDA). Eligibility for IDA support depends on a country's relative poverty, defined as GNI per capita below an established threshold and updated annually (USD 1,335 in the fiscal year 2025). The three countries that are considered as lower-middle income – Kenya, Mauritania, and Nigeria – are considered as blend countries. This means they are eligible for IDA support based on per capita income, but are also credit worthy enough to borrow from the International Bank for Reconstruction and Development (IBRD).

Given limited fiscal budgets in these countries, additional finance will need to be mobilized from a variety of sources (including international organisations and the private sector). It is important that finance is provided on concessional terms as far as possible, so as not to exacerbate debt sustainability challenges. According to the IMF four of the 15 countries are in debt distress (Djibouti, Eritrea, Ethiopia, and Sudan); Chad, Kenya and South Sudan are at risk of debt distress; and six of the countries (Ethiopia, Kenya, Niger, Nigeria, Senegal, and Uganda) have had their credit ratings downgraded since 2020[4].

2. Analysis of regional climate finance flows to AFOLU (all 15 countries, 2010 – 2022)

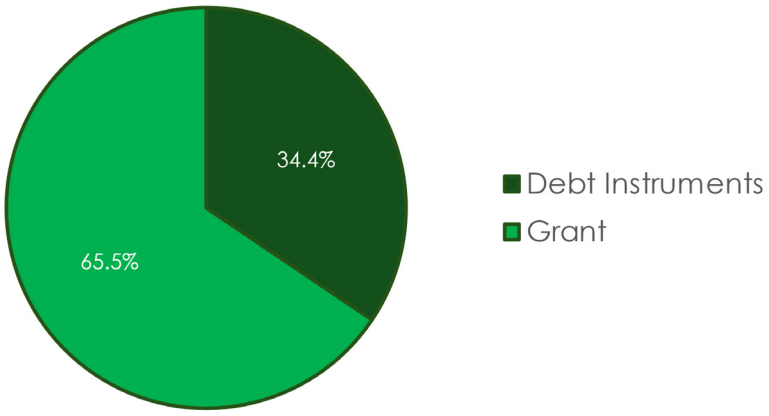
This section provides an analysis of climate finance flows to AFOLU related activities – aggregated across the 15 countries in this study - during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 29.3 billion was allocated to AFOLU-related activities in the region. On a year-by-year basis, allocated funding has generally been on an upward trend. The lowest annual total was USD 567.9 billion in 2011, with annual funding peaking in 2022 at USD 4.8 billion. When compared to AFOLU funding to whole of Sub Saharan Africa in the same period, the total funding allocated to these 15 countries is 45.5% of the total regional allocation (which was USD 64.4 billion).

As indicated in Figure 1 (below), between 2010 – 2022, AFOLU funding was mostly allocated in as grants (65.5%). Debt-related instruments accounted for 34.4% of funding in this period, and equity accounted for just 0.1% of total funding. Concerningly however, the percentage of debt instruments as a share of total annual allocated funding appears to be increasing – in the last three years, debt related instruments have on average accounted for 43.7% of the annual total AFOLU allocations (peaking at 52% of the annual total in 2020). This increase in the use of debt instruments is of particular concern given the debt vulnerability of countries in the region.

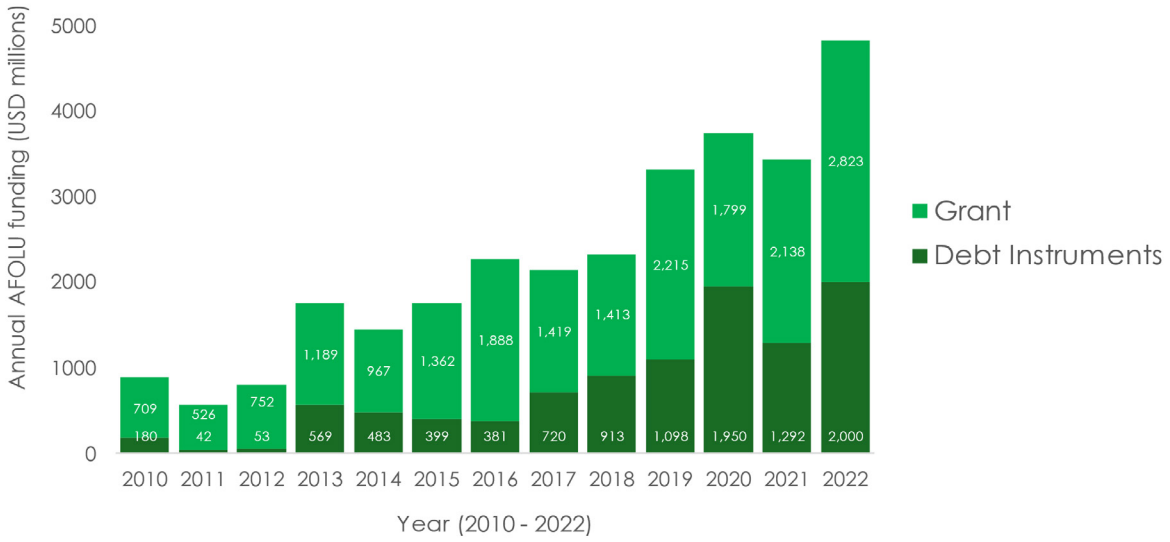
4 Climate Policy Initiative (October 2024), Landscape of Climate Finance in Africa 2024

Figure 1. Share of total AFOLU climate finance by instrument across all 15 countries (2010 – 2022)



When compared trends across the whole of Sub-Saharan Africa, the breakdown of funding by instrument shows that the share of grant funding is marginally lower for the fifteen countries (65.5%) when compared with the whole of SSA (70.3%), this indicates that despite their high vulnerability (both to climate change and in terms of debt vulnerability) this group of countries (as a whole) are not receiving the same proportion of concessionality as the whole region.

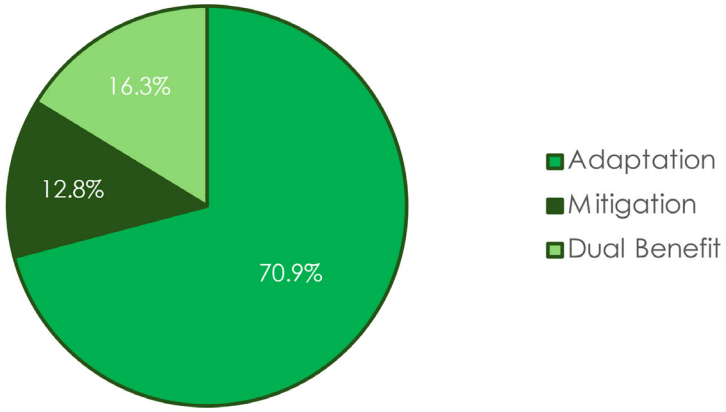
Figure 2. Share of annual climate finance to AFOLU by instrument all 15 countries (2010 – 2022)



As shown in Figure 3, most funding in this period (70.9%) was allocated to adaptation interventions. Mitigation funding was 12.8 of the total, and the remaining 16.3% was for dual benefit projects. There were not any particularly significant changes in the share on a year-by year basis. Adaptation funding accounted for at least 59% of annual totals in the region in all years during this period, with the highest sharing being 76.5% of annual funding in 2013. When compared to trends across the whole

of Sub Saharan Africa, the share of adaptation funding was slightly higher in this group of 15 countries (average of 70.9% vs. an average of 63.8% for adaptation in the whole of SSA).

Figure 3. Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU – all 15 countries (2010-2022)



On a per capita basis the average annual funding received by agricultural workers across all 15 countries grew from USD 3.63 in 2010 to USD 15.56 in 2022. On an individual country basis Senegal had the highest per capita funding. The country that received the lowest funding on a per capita basis was Nigeria.

Between 2010-2022, 40.3% of the AFOLU-related funding allocated to the group of 15 countries was for projects that had a significant gender focus; 4.9% was allocated for projects where gender was the principal focus; 12.8% was allocated to projects where there was no gender focus; and the remaining 42.1% was allocated to projects where the gender focus was not specified.

As noted in Table 1 below, the five highest providers of climate finance in this period accounted for approximately 59% of total funding allocated to AFOLU projects between 2010 – 2022.

The World Bank was the main provider of finance to this group of countries, however debt instruments accounted for 70.61%. The EU was the largest provider of grant funding (with grants accounting for 100% of funding allocated to AFOLU in this period). Germany was the second highest provider of grant funding during this period (with grant funding accounting for 92.7% of Germany's total funding allocation to AFOLU projects).

Table 2. Top 5 providers of climate finance for AFOLU projects – all 15 countries (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	World Bank	8,515.51	29.1%
2	Germany	2,847.34	9.7%
3	EU Institutions (excluding EIB)	2,832.65	9.7%
4	United States of America	1,562.33	5.3%
5	France	1,514.99	5.2%

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities across all 15 countries were as follows: National Governments received 52.64% of total funding; NGOs based in donor countries received 9.45%; 5.93% of total allocated funding was to unspecified recipients; the remainder largely went to public international agencies (such as UN agencies and international NGOs). Private institutions (in both donor and recipient countries) received only 1.46% of all allocated funding. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent by recipient institutions.

Finally, in addition to our analysis of the OECD DAC data, we also analysed funding allocations and disbursements made by the Green Climate Fund (GCF) to AFOLU projects. Our analysis estimates that across all 15 countries combined, the GCF has allocated USD 975 million to projects and programmes with an AFOLU focus. Of this total allocation, an estimated USD 266.47 million (27.3%) has been disbursed, as of October 2024.

BURKINA FASO

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Burkina Faso's Nationally Determined Contribution (NDC) for the period 2021 – 2025 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Burkina Faso's climate policies. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture ranged from 79.1% in 2010 to 74.1% in 2022. Whilst the overall share of the population employed in agriculture is falling, the sector remains a key source of employment. Additionally, as noted in Burkina Faso's NDC, it is currently the highest emitting sector (accounting for at least 90% of national emissions between 1995 – 2015) and is highly vulnerable to the effects of climate change.

Mitigation targets established in the NDC aim for emissions reductions of between 8.13% (unconditional) and 10.91% (conditional) by 2025. The projected cost of mitigation needs for the AFOLU sector in Burkina Faso's NDC is approximately USD 37 million.

Adaptation objectives established in Burkina Faso's NDC include REDD+, landscape management and restoration, and sustainable forest management. Total adaptation finance needs for the AFOLU sector are estimated at USD 2.1 billion (this is broken down into USD 804 million for environment, USD 1.1 billion for agriculture, and USD 202 million for animal resources). The AFOLU sector interventions account for approximately half the projected costs of implementing all the targets in Burkina Faso's NDC, which in total amount to USD 4.1 billion.

Burkina Faso's National Climate Change Adaptation Plan (NAP) establishes adaptation objectives for the period up to 2025. Interventions in the AFOLU sector are divided according to objectives for agriculture, animal production, and environment and natural resources. A summary table of AFOLU interventions and projected costs is shown below. Total projected costs for all AFOLU related objectives are estimated at USD 3.36 billion.

Table 1. Summary of AFOLU interventions and projected costs in Burkina Faso's National Adaptation Plan

Development sector	Objectives	Funding needs FCFA (billions) and USD (millions)
Agriculture	1. Restore the fertility of degraded land 2. Improve access for farmers to high quality agricultural production factors (equipment, inputs, land, results of agricultural research etc.) 3. Improve the resilience of stakeholders to climate change 4. Develop early warning systems to ensure efficient management of climate variability and change	FCFA 1,313 billion USD 2.1 billion

Development sector	Objectives	Funding needs FCFA (billions) and USD (millions)
Animal Resources	1. Improve the security of pastoral activities through better dissemination and exploitation of information on pastoral resources and associated access 2. Ensure the security of animal capital with a view to supporting the pastoral economy on a sustainable basis and improve the resilience of stakeholders in order to achieve sustainable food security in Burkina Faso 3. Reduce the vulnerability of farmers to climate change and contribute to local economic development	FCFA 375 billion USD 630 million
Environment and natural resources	1. Increase productivity and the resilience of ecosystems 2. Improve biodiversity conservation 3. Improve research and ecological monitoring 4. Reduce emissions	FCFA 375 billion USD 630 million
Total		**CFA 2,063 billion (approx. USD 3.36 billion)**

Source: Government of Burkina Faso (2015), Burkina Faso's National Adaptation Plan

2. Analysis of climate finance flows to Burkina Faso (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Burkina Faso during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 1.99 billion was allocated to AFOLU-related activities in Burkina Faso. On a year-by-year basis, allocated funding has generally been on an upward trend. The lowest annual total was USD 41 million in 2010, with annual funding peaking in 2021 at USD 411.9 million.

As noted above, meeting the AFOLU targets established in Burkina Faso's NDC will require USD 2.1 billion by 2025. This is an average of USD 420 million per year in the period 2021 – 2025. Our analysis shows that funding allocated to AFOLU activities in Burkina Faso was USD 411.9 million in 2021 and USD 238.7 million in 2022. For both years, the total funding allocations were below the required needs. It should also be reiterated that these figures are for funding allocations, and that it is unclear from the OECD DAC data, what percentage of this funding has been disbursed. This indicates that Burkina Faso is not on track to meet the objectives established in its NDC.

Furthermore, the estimated total funding allocations from our analysis are high when compared to other analysis of climate finance flows for AFOLU in Burkina Faso. For example, analysis by Climate Policy Initiative found that between 2019/20, Burkina Faso received USD 148 million in climate finance for AFOLU

projects[1]. For the same two-year period, our analysis of the OECD DAC data shows that USD 417.78 million was allocated to AFOLU related projects. The exact reasons for the differences in these estimates are unclear but are likely to be partly due to different methodologies and / or that our analysis of the OECD data shows allocated funding (rather than funding disbursed). Either way, it highlights that funding for AFOLU in Burkina Faso remains insufficient, and that greater transparency is required on the reporting of climate finance disbursements.

As indicated in Figure 1 (below), AFOLU funding in this period was mostly allocated in the form of grants (75%), with the remaining 25% being through loans and other debt-related instruments. Less positively, as indicated in Figure 2, whilst overall AFOLU-related funding to Burkina Faso appears to be increasing, debt-related instruments appear to account for a large proportion of this additional funding.

Figure 1. Burkina Faso – Share of total AFOLU climate finance by instrument (2010 – 2022)

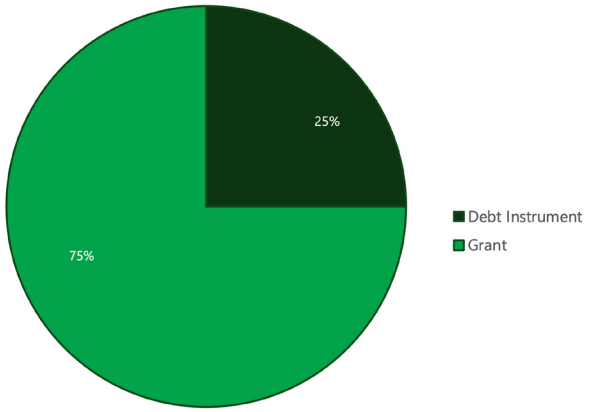
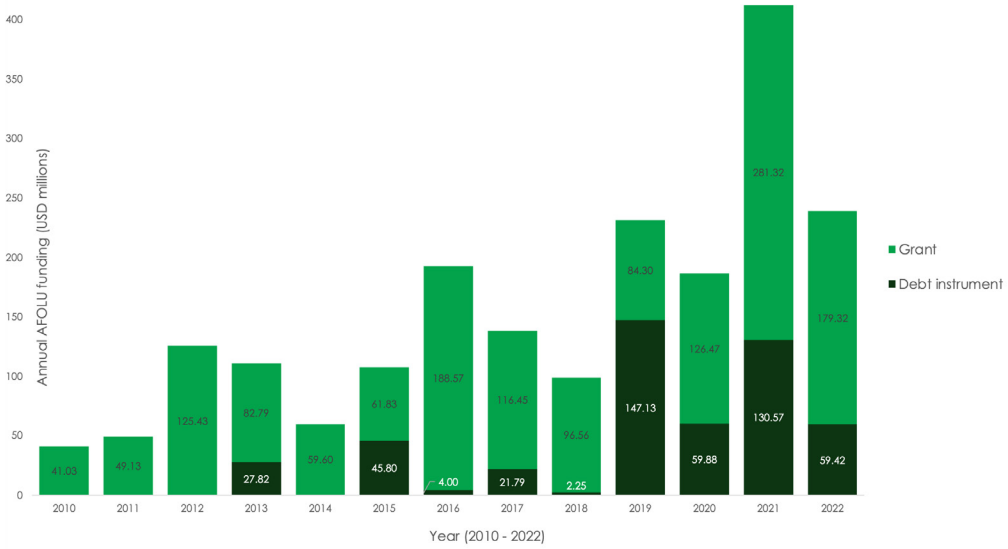


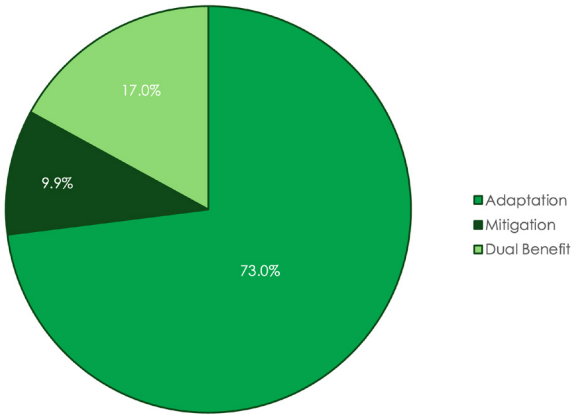
Figure 2. Burkina Faso – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



1 Climate Policy Initiative (October 2022), Landscape of Climate Finance in Burkina Faso

As shown in Figure 3, most funding in this period (73%) was allocated to adaptation interventions. This makes sense given that most of the climate finance needs for AFOLU identified in Burkina Faso's NDC and NAP are for adaptation activities. However, there is still a significant funding gap. Total adaptation funding captured by the OECD DAC data was USD 1.45 billion in this period. This is under 50% of the USD 3.36 billion in climate finance needs for AFOLU identified in Burkina Faso's NAP (see table 1 above).

Figure 3. Burkina Faso – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010 – 2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of Burkina Faso that are employed in agriculture), funding is mostly aligned with or above the regional average (for all 15 countries included in this analysis).

Between 2010-2022, 52% of the AFOLU-related funding allocated to Burkina Faso was for projects that had a significant gender focus. 11.8% was allocated for projects with no gender focus, just 3% was allocated to projects where gender was the principal focus. The remaining 33.3% of funding was to projects where the gender focus was unspecified.

Figure 4. Burkina Faso – Annual per capita AFOLU climate funding to population employed in agriculture (2010 – 2022). National average vs regional average

The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of the these elements, our analysis included a review of the project databases of the main providers of finance to Burkina Faso. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 62.5% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Burkina Faso were as follows: National Governments received 56.16% of total funding; NGOs based in the country providing the funding received 9.68%; public sector institutions received 5.2%; NGOs based in developing countries received 4.27%; and The World Food Programme received 3.84%. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 2. Burkina Faso – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	World Bank	419.46	21.1%
2	Germany	279.81	14.1%
3	EU Institutions (excluding EIB)	263.81	13.2%
4	France	154.93	7.8%
5	Denmark	126.04	6.3%

3. Analysis of projects funded by the three main providers of climate finance (2010 – 2022)

World Bank

According to the World Bank finance summary for Burkina Faso, in the period 2010 – 2022, the World Bank disbursed USD 3.086 billion in funding to Burkina Faso (all of which was via the International Development Association). It is unclear however how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

According to our analysis of the OECD DAC data, the World Bank allocated USD 419.46 million in climate funding for AFOLU activities in Burkina Faso between 2010 – 2022 (21.1% of total climate funding). Of this, USD 252.41 million (60.2%) was in via debt instruments, and the remaining USD 167.05 million (39.8%) was in the form of grants.

A review of the World Bank project database found that between 1st January 2010 and 31st December 2022, funding was approved for 31 projects with relevance to the AFOLU sector.

For the majority of projects World Bank funding was channelled via a national government ministry (particularly the Ministry of Economy and Finance). It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

A few exceptions of AFOLU-related projects where the funding was channelled via an NGO or local authority, are provided below.

- **Local Forest Communities Support Project** – Grant funding of USD 4.5 million provided to IUCN Burkina Faso. The objective of the Project is to strengthen the capacity of targeted local communities in the targeted regions of Burkina Faso to participate in REDD+ programs at local, national and global levels.
- **Support to the National Biodigester Program** – Grant funding of USD 3.65 million was provided to SNV (the Netherlands Development Organisation) for a project that to aims to increase use of biodigesters in rural households of Burkina Faso.

Germany

According to our analysis of the OECD DAC data, Germany allocated USD 279.81 million in climate funding for AFOLU activities in Burkina Faso between 2010 – 2022 (14.1% of total funding received). All this funding was provided in the form of grants.

Development cooperation between Germany and Burkina Faso focuses on the following three core areas:

1. Transformation of agricultural and food systems
2. Peaceful and inclusive societies
3. Conserving nature and natural resources, protecting life on Earth

In Burkina Faso, support from Germany is mainly provided by GIZ, on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ).

The GIZ website notes that "GIZ is supporting Burkina Faso in reducing hunger and poverty while generating incentives for investment in agriculture and rural areas. It is promoting value creation in agriculture and the generation of new jobs. This opens up new opportunities for local people to participate in agricultural development. Important topics here include green innovation, soil restoration and youth entrepreneurship, as well as agricultural loans and food safety".

The GIZ project database shows that it has implemented a total of 32 projects in Burkina Faso, with a total value of EUR 263 million. Eleven of the 32 projects that are implemented in Burkina Faso have a focus on agriculture and the environment. Notable examples include:

- **The Agricultural Development Program (2022-2025)** – EUR 10.9 million. The objective is enhancing the climate resilience of actors in the rice, cassava, and soya value chains.
- **CATAL1.5°T Initiative: supporting investments in innovative climate start-ups in Latin America and West Africa** – GIZ is the Accredited Entity of this Green Climate Fund and BMZ funded multi-country programme. The ultimate objective is to enable start-ups and emerging companies to access venture capital more easily, develop climate-protection solutions and support the transition to climate-neutrality.

- **Making cotton production in Burkina Faso more sustainable and supporting local cotton processing.**
- **Conserving and rehabilitating soil to promote food security and climate protection.**

EU Institutions

According to our analysis of the OECD DAC data, the EU institutions allocated USD 263.81 million in climate funding for AFOLU activities in Burkina Faso between 2010 – 2022 (13.2% of total funding). All this funding was provided as grants.

The Fourth Biennial Update Report from the European Union (2022), notes that the EU Institutions have provided funding to the following AFOLU related initiatives in Burkina Faso:

- Projet de développement de la valeur ajoutée des filières agricoles (VAFA) – (Added value development project for agricultural sectors). Funding provided by the EU was USD 10.37 million grant funding.
- SWITCH Africa Green is being implemented in 6 countries: Burkina Faso, Ghana, Kenya, Mauritius, South Africa and Uganda. SWITCH Africa Green is implemented across 4 sectors: agriculture, integrated waste management, manufacturing and tourism. The overall objective of the programme is to contribute to poverty reduction in Africa in the context of sustainable development through support to private sector led inclusive green growth that fosters transformation towards green economy. The EU is the main funder, with a EUR 21.5 million grant. UNEP, UNDP and UNOPs are the implementing agencies.

The European Commission website lists the Multiannual Indicative Programme (MIP) for Burkina Faso for 2021-2024 as their main program in the country. The total funding allocated to this program is EUR 384 million, which is distributed across three priority areas:

1. Peace - Social cohesion - Good governance - Local development
2. Inclusive human development
3. Green and resilient economy

Additionally, the European Union website notes that it has provided EUR 285.45 million in humanitarian funding to Burkina Faso since 2014, although it is unclear what proportion (if any) of this funding was relevant to AFOLU.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 136.3 million in project funding to Burkina Faso. This funding is spread across 12 projects and programmes which span multiple sectors (including several multi-country programmes which include Burkina Faso).

Our analysis found that eight of these projects and programmes had relevance to the AFOLU sector, and that for this group, GCF funding allocated to Burkina Faso totalled USD 71.98 million (approximately 52.7% of the total GCF funding allocated to Burkina Faso). Across these eight projects and programmes, our analysis estimates that USD 34.18 million has been disbursed to date, this is 47.49% of the estimated funding allocated to AFOLU.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally, the GCF had allocated USD 5.3 million in readiness funding to Burkina Faso, however it is unclear how much of

this funding has been disbursed, and how much is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusions

- Analysis of climate-related development finance to AFOLU activities in Burkina Faso found that, although funding is on an upward trend, it is still falling short of the levels required to implement relevant objectives established in Burkina Faso's NDC and NAP.
- There is also an increase in the proportion of total funding being provided as loans or other debt related instruments.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or international organisations. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

CHAD

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Chad's Nationally Determined Contribution (NDC) for the period 2021 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Chad's climate policies. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture ranged from 74.9% in 2010 to 69.15% in 2022. Whilst the overall share of the population employed in agriculture appears to be falling, the sector remains a key source of employment. Additionally, as noted in Chad's NDC, it is currently the highest emitting sector and is highly vulnerable to the effects of climate change.

Adaptation objectives outlined in Chad's NDC include targets in the agriculture, and forestry and environment sectors. The adaptation and mitigation objectives for each sector are outlined in Table 1 below.

Chad's NDC does not provide a full breakdown of funding needs for all adaptation and mitigation objectives. It is noted that the mitigation objectives are dependent on USD 3.56 billion external funding. The adaptation funding needs are less clear, as they are estimated at 3% of projected GDP. Based on current projections adaptation funding needs for AFOLU could reach a total of USD 5 billion between 2020-2030. Chad's GCF Country Programme can also serve as a barometer of adaptation finance needs. The Country Programme projects funding needs of USD 2.28 billion for eleven adaptation projects up to 2030, and the programme only addresses only part of the priority interventions outlined in Chad's NDC.

Table 1. Summary of AFOLU interventions and projected costs in Chad's Nationally Determined Contribution

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
Adaptation	Agriculture • Promotion of improved crop varieties • Development of agroforestry • Commodity chain approach in the agro-pastoral and organic farming sectors • Improvement of adapted animal breeds • Improvement of water management for agriculture • Management of pastoral zones • Development of fodder crops	No specific adaptation finance needs for the AFOLU sector are provided. Chad's NDC estimates total adaptation finance needs at 3% of projected GDP for each year between 2020-2030. Based on these estimates, total adaptation finance needs could reach a total of USD 5 billion over the period.

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
	Environment and forestry • Development of non-timber forest products • Establishment and effective management of community forests • Protection and conservation of biodiversity and protected areas • Bush and forest fire management	It should be noted that the Green Climate Fund Country Program has an estimated budget of 2.280 billion USD for eleven (11) adaptation projects up to 2030, and that the program addresses only part of the priority sectors identified by this updated NDC.
Mitigation	Agriculture – none of the actions planned in Chad's NDC (apart from the installation of digesters on farms, which is counted as energy) is directly aimed at reducing agricultural emissions. Forestry and land use - Reforestation and reforestation actions are underway or planned to improve the carbon sink by 2030. As part of the Bonn Challenge, Chad has committed to reforesting a total of 5 million hectares by 2030, including shrub savannahs in the Sahelian zone (3.5 Mha) and trees in the Sudanese zone (1.5 Mha). Protection actions to avoid deforestation (877,000 ha) and restoration actions (50,000 ha) are also included in the 2030 action plan. The impact of these actions is estimated at additional absorptions of 9,400 kt CO2eq in 2030, plus 4,909 kt CO2eq of emissions avoided through energy efficiency actions.	USD 3.56 billion (all funding needs for AFOLU interventions are conditional, there are no unconditional mitigation targets).
Total		**Minimum of USD 3.56 billion by 2030**

Sources: Republic of Chad (October 2021), Nationally Determined Contribution; and Green Climate Fund (May 2019) - Republic of Chad, GCF Country Programme

2. Analysis of climate finance flows to Chad (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Chad during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 1.04 billion was allocated to AFOLU-related activities in Chad. On a year-by-year basis, allocated funding has generally been on an upward trend. The lowest annual total recorded was USD 10.2 million in 2011. Annually funding allocations to AFOLU peaked in 2016, where USD 233 million was allocated. This was followed by a dip, and then annual allocations have again grown and have remained above USD 100 million since 2020.

As indicated in Figure 1 (below), 97% of funding allocated to AFOLU activities was in the form of grants. The remaining 3% of funding was through debt related instruments.

Figure 1. Chad – Share of total AFOLU climate finance by instrument (2010 – 2022)

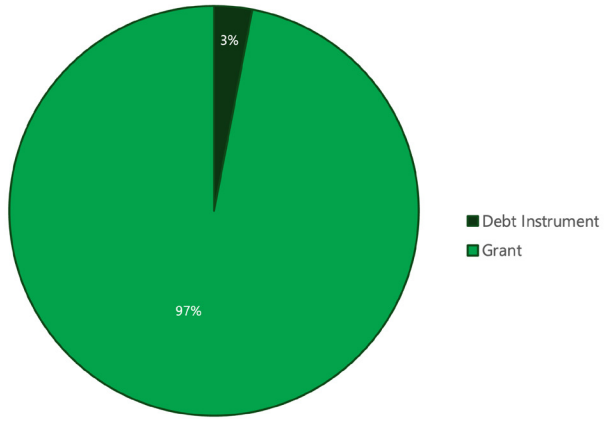
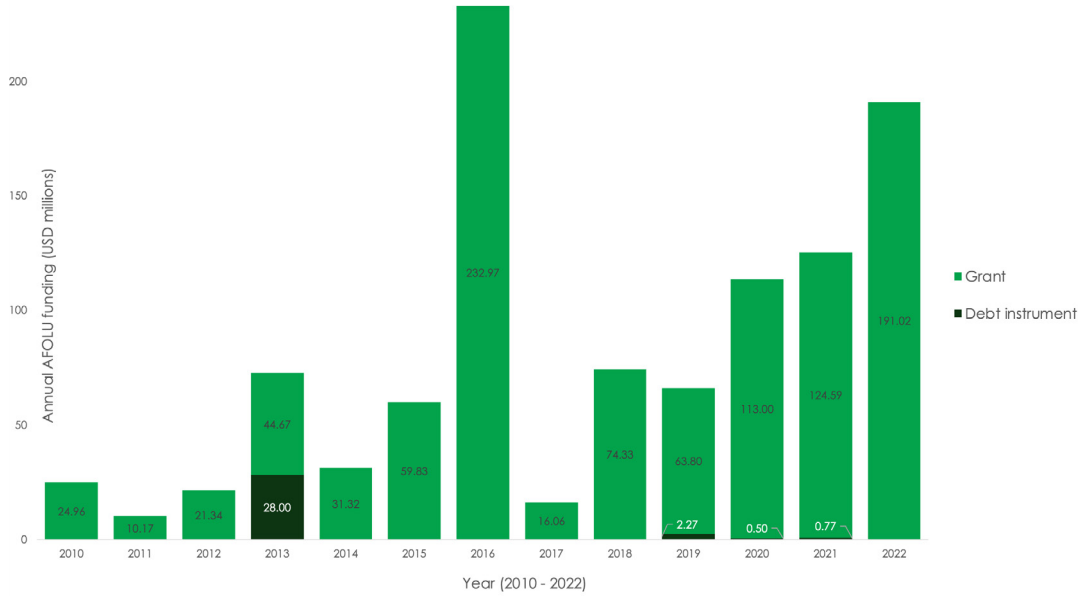
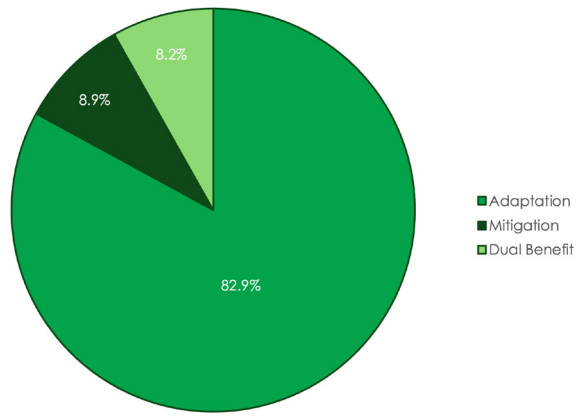


Figure 2. Chad – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3, most funding in this period (82.9%) was allocated to adaptation interventions. The remaining 17.1% was almost equally split between mitigation and dual benefit activities. The total adaptation funding allocated for AFOLU projects in this period was USD 862.2 million, Whilst Chad's NDC and NAP do not provide an exact estimate of total climate finance needs for AFOLU, given the importance of the AFOLU sector to the economy and based on minimum overall estimates of climate finance needs (USD 3.56 billion just for mitigation activities), it appears that if climate finance allocations remain at current levels, they will be insufficient to meet all 2030 objectives.

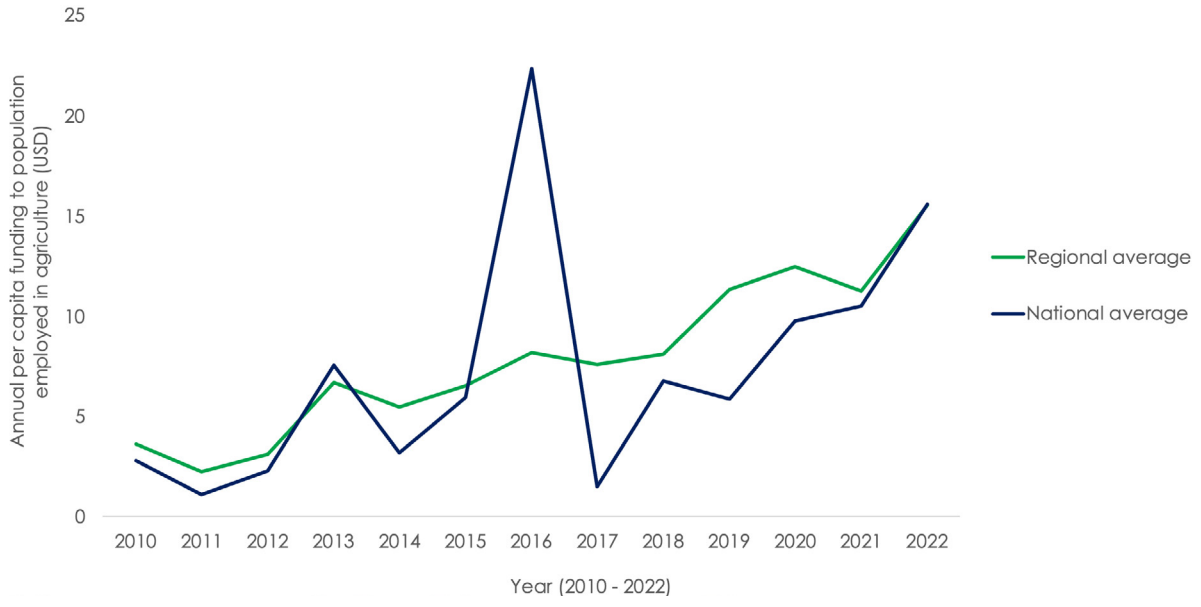
Figure 3. Chad – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of Chad that are employed in agriculture), funding is mostly aligned with or above the regional average (for all 15 countries included in this analysis). There are only two years which have significant deviations from the regional average. In 2016, annual per capita funding was significantly higher than the regional average, and in 2017 it dropped significantly below the regional average.

Between 2010-2022, 48.4% of the AFOLU-related funding allocated to Chad was for projects that had a significant gender focus. 12.4% was allocated for projects with no gender focus, just 3.9% was allocated to projects where gender was the principal focus. The remaining 35.2% of funding was to projects where the gender focus was unspecified.

Figure 4. Chad – Annual per capita AFOLU climate funding to population employed in agriculture (2010 – 2022). National average vs regional average



The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our analysis included a review of the project databases of the main providers of finance to Chad. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 82.2% of total funding allocated to AFOLU projects in Chad between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Chad were as follows: National Governments received 45.52% of total funding; NGOs based in donor countries received 13.49%; The World Food Programme received 6.58%. The remaining funding was largely managed by public institutions such as donor governments, UN agencies, multilateral development banks, and international NGOs. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 2. Chad – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	EU Institutions (excluding EIB)	299.45	28.8%
2	World Bank	225.37	21.7%
3	Switzerland	144.32	13.9%
4	Germany	114.75	11.0%
5	France	70.30	6.8%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

EU Institutions (excluding the EIB)

According to our analysis of the OECD DAC data, the EU institutions allocated USD 299.45 million in climate funding for AFOLU activities in Chad between 2010 – 2022 (28.8% of total funding). All this funding was provided as grants.

The Fourth Biennial Update Report from the European Union (2022), notes that the EU Institutions have provided funding to the following AFOLU related initiatives in Chad:

- The Pro Resilience Action – (PRO-Act) aims to build resilience to food crisis and strengthen food security. Multi-Country: Cameroon, The Republic of Chad, Democratic People's Republic of Korea, Democratic Republic of Congo, Mozambique, Nigeria, Sudan,

and Syria. Total funding committed is USD 38.96 million.

- Contribution to the European Union Emergency Trust Fund Africa - EUR 20 500 000 will be allocated to the Sahel and Lake Chad window, and EUR 9 000 000 will be allocated to the Horn of Africa window of this Trust Fund.

Under the Under the Neighbourhood, Development and International Cooperation Instrument (NDICI-Global Europe), the EU allocated EUR 280 million to its partnership with Chad for 2021-2024. The country also benefits from other multi-country EU development programmes.

The European Commission website lists the Multiannual Indicative Programme (MIP) for Chad for 2021-2027 is the main EU program for Chad. Green economy is one of the flagship initiatives of the EU in Chad, this includes:

- **Agriculture and value chains:** the EU develops the production, commercialisation, and entrepreneurship capacities of 1) dehydrated cereal-based products that are part of the basic diet of infants, children, and adults, as well as 2) spirulina. This will be linked with the N'Djamena – Douala transport corridor to lay the basis for boosting regional connectivity.
- Integrated conservation of biodiversity, including Chad's iconic great fauna, and landscape development, in line with the international Great Green Wall initiative.

World Bank

According to the World Bank finance summary for Chad, in the period 2010 – 2022, the World Bank disbursed USD 745 million in funding to Chad (all of which was via the International Development Association). It is unclear however how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

According to our analysis of the OECD DAC data, the World Bank allocated USD 225.37 million in climate funding for AFOLU activities in Chad between 2010 – 2022 (21.7% of total climate funding). All of this funding was provided as grants.

A review of the World Bank project database found that between 1st January 2010 and 31st December 2022, funding was approved for 13 AFOLU projects, with total funding commitments of USD 433.54 million. For the majority of projects World Bank funding was channelled via a national government ministry (particularly the Ministry of Agricultural Production and Transformation, the Ministry of Economy and Development Planning, and the Ministry of Land Management, Urban and Housing). It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

Notable AFOLU projects funded by the World Bank in this period include:

- **Climate Resilient Agriculture and Productivity Enhancement Project** – project objective is to promote the adoption of improved technologies leading to increased productivity and to enhance the climate resilience of agricultural production systems in the areas targeted by the Project. The total World Bank funding commitment was USD 56 million.
- **Agricultural Production Support** – objective is to support rural communities and producer organizations in increasing (i) the production of selected crops and livestock species in selected areas of Chad's territory; and (ii) the use of sustainable land and water management practices in climate vulnerable ecosystems. The total World Bank funding commitment was USD 29.63 million.

- **Chad Value Chain Support Project** – the objective of the projects is to improve targeted aspects of the business environment; and the performance of agro-pastoral value chains (particularly the meat and dairy value chains). The total funding commitment by the World Bank was USD 10.2 million.

Switzerland

According to our analysis of the OECD DAC data, Switzerland allocated USD 144.32 million in climate funding for AFOLU activities in Chad between 2010 – 2022 (13.9% of total climate funding). All of this funding was provided as grants.

The focus of Switzerland's cooperation programme with Chad is on strengthening responsible and representative institutions, and promoting high-quality basic services in health and education. Other work involves promoting the development of sustainable markets and improving food security, and strengthening the resilience of the population to climate change.

Switzerland is supporting the agricultural and livestock sectors and the development of appropriate inclusive market systems. The objective is to improve the population's adaptive capacity with regard to climate change, provide access to extension and advisory services, increase production and create economic opportunities and decent jobs, especially for women and young people. Switzerland's cooperation programme in Chad will help to open up opportunities for vulnerable population groups to generate additional income and improve their living conditions. It offers measures for better management and use of water and soil, increased soil fertility and better access to productive resources. In addition, it encourages the development of employment opportunities by improving vocational training and adapting it to the needs of the market and the expectations of young people.

According to the project database of the Swiss Cooperation Office funding, Switzerland has committed CHF 180.47 million (USD 208.62 million) in funding for 33 AFOLU projects in Chad since 2010.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 78.7 million in project funding to Chad. To date, all of the project funding to Chad has been through six multi-country programmes, which span several sectors.

Our analysis found that three of these programmes had relevance to the AFOLU sector, and that for this group, GCF funding allocated to Chad totalled USD 28.16 million (approximately 35.8% of the total GCF funding allocated to Chad). Across these three programmes, our analysis estimates that USD 4.1 million has been disbursed to date, this is 14.5% of the estimated funding allocated to AFOLU activities in Chad.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF had allocated USD 3.6 million in readiness funding to Senegal across 10 readiness activities, however it is unclear how much of this funding has been disbursed, and how much is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusions

- Analysis of climate-related development finance to AFOLU activities in Chad found that, although funding is generally on an upward trend, it is still falling short of the levels required to implement relevant objectives established in Chad's NDC and NAP. Minimum estimated annual funding needs for implementation of AFOLU related NDC targets are on average USD 350 million per year. This figure is the annual average for projected mitigation finance needs, and does not include projected adaptation needs (which are not clearly estimated in the NDC) but are likely to be high (particularly given the GCF Country Programme for Chad estimates a budget of USD 2.28 billion for 11 adaptation projects). Our analysis of the OECD DAC data shows that on a year-by-year basis allocated funding to for AFOLU projects in Chad have never reached this minimum projected target. Further during the years that align with Chad's NDC implementation period, the highest recorded funding allocation was USD 191 million in 2022. All this suggests that a significant funding gap persists.
- On a more positive note, the majority of funding (97%) allocated for AFOLU activities has been in the form of grants. This indicates that the funding that Chad does receive is highly concessional.
- On a per capita basis, funding allocated to Chad is generally aligned with the regional average on a year-by-year basis.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or international organisations. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

DJIBOUTI

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Djibouti's Nationally Determined Contribution (NDC) for the period 2015 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Djibouti's climate policies. According to IFAD agriculture is the main source of income for rural communities, which comprise about 30% of the total population.

Adaptation objectives outlined in Djibouti's NDC include targets in the agriculture, and forestry and environment sectors. The adaptation and mitigation objectives for each sector are outlined in Table 1 below. Djibouti's NDC does not provide a full breakdown of funding needs for all adaptation and mitigation objectives.

Table 1. Summary of AFOLU interventions and projected costs in Djibouti's Nationally Determined Contribution

Adaptation / Mitigation	Objectives	Funding needs in USD (millions)
Adaptation	Adaptation priorities in the AFOLU sector include: • Reducing vulnerability to drought • Protection against rising sea levels • Developing access to water • Protecting biodiversity • Strengthening the resilience of rural populations	Total adaptation needs (across all sectors) are estimated at between USD 833 million (for a + 2°C scenario) and USD 1.33 billion (for a + 4°C scenario). Specific costings for AFOLU needs are not provided in Djibouti's NDC.
Mitigation	The Republic of Djibouti is committed to reducing its GHG emissions in 2030 by 40%, or nearly 2Mt CO2 e, compared with the projected emissions for the same year under the reference scenario. AFOLU sector mitigation interventions are: • Reforestation of 1000ha with implementation of a silvo-pasture agrosystem • Implementation of a 1000ha agroforestry system.	Total mitigation needs across all sectors are USD 6.5 billion (based on a 6% growth scenario). AFOLU needs are not specified.
Total		**Minimum of USD 5.5 billion**

2. Analysis of climate finance flows to Djibouti (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Djibouti during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 155.4 million was allocated to AFOLU-related activities in Djibouti. In several years (2010, 2011, and 2019) no funding was allocated to Djibouti. The largest annual allocations were 2013 and 2017.

As indicated in Figure 1 (below), 84.5% of funding allocated to AFOLU activities was in the form of grants. The remaining 15.5% of funding was through debt related instruments.

Figure 1. Djibouti – Share of total AFOLU climate finance by instrument (2010 – 2022)

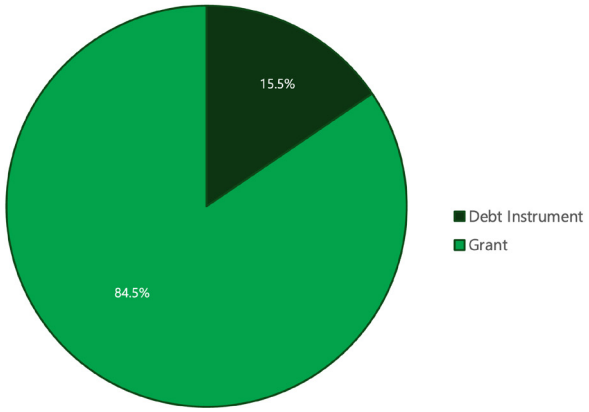
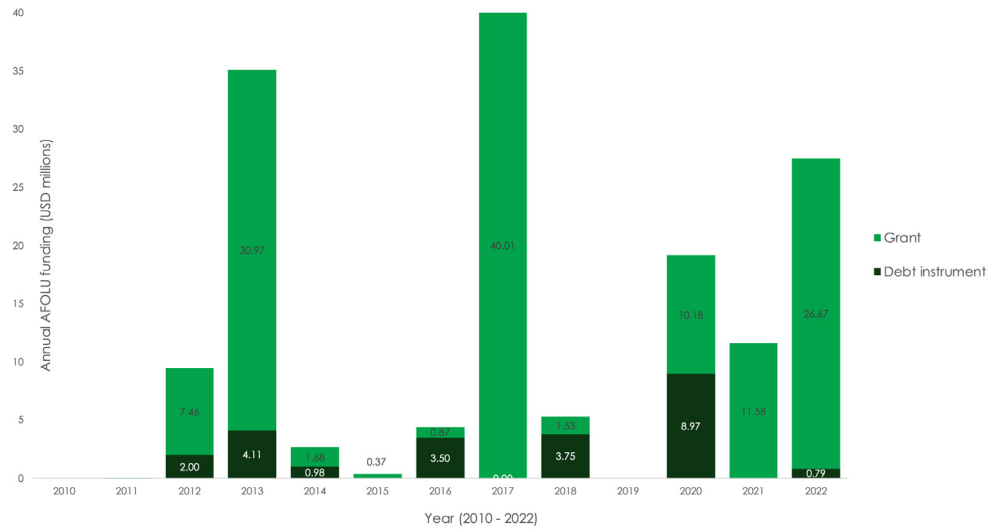


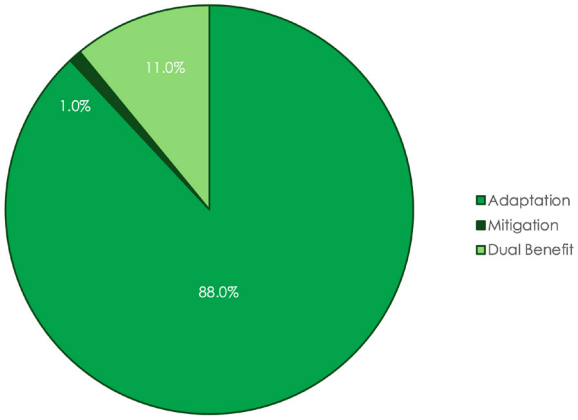
Figure 2. Djibouti – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3, most funding in this period (88%) was allocated to adaptation interventions. Funding allocations for mitigation amounted to just 1% of total allocated funding, the remaining 11% was for dual benefit activities.

Between 2010-2022, 38.6% of the AFOLU-related funding allocated to Djibouti was for projects that had a significant gender focus. 12.9% was allocated for projects with no gender focus, 5.1% was allocated to projects where gender was the principal focus. The remaining 45.2% of funding was to projects where the gender focus was unspecified.

Figure 3. Djibouti – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our analysis included a review of the project databases of the main providers of finance to Djibouti. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 82.6% of total funding allocated to AFOLU projects in Djibouti between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Djibouti were as follows: National Governments received 51.19% of total funding; The United Nations Development Programme, United Nations Environment Programme, and the UN Food and Agriculture Organisation each received 11.99%, 6.87% and 6.74% respectively; 9.10% of funding was to undisclosed recipients; and the remainder went to a variety of other public sector institutions and international agencies. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 2. Djibouti – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	EU Institutions (excluding EIB)	49.95	32.1%
2	Global Environment Facility	29.93	19.3%
3	World Bank	20.43	13.1%
4	IFAD	16.48	10.6%
5	France	11.59	7.5%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

EU Institutions

According to our analysis of the OECD DAC data, the EU institutions allocated USD 49.95 million in climate funding for AFOLU activities in Djibouti between 2010 – 2022 (32.1% of total funding). All this funding was provided as grants.

Through its development cooperation policy, the EU provides Djibouti with approximately EUR 24 million each year, the majority of this funding comes from the European Development Fund. The EU website notes that between 2014-2020, EUR 105 million was allocated to Djibouti. To date, EU funding has predominantly supported activities the following four areas:

- Provision of drinking water and improved hygiene conditions
- Promotion of socio-economic development, including food security
- Support to vulnerable groups on the basis of human rights
- Building capacity of the Djiboutian administration

From a food security perspective, the main goal is to provide support for o rural economic development in the interior regions. EU projects aim to improve economic opportunities in the regions by supporting the creation of income-generating activities and by increasing productivity in the primary sector.

Existing food security initiatives supported by the EU are being supplemented with soon to be launched by a National Gender Equality Policy and the development of an incubator for SMEs. A civil society project has also been launched to improve the culture of democracy and dialogue through more effective participation of civil society organisations and the private sector in the political, economic and social life of the country. The EU is also supporting decentralisation, governance and local development in line with the government's policy to reduce poverty within the country by developing Djibouti's 5 regions.

Global Environment Facility

According to our analysis of the OECD DAC data, the Global Environment Facility allocated USD 29.93 million in climate funding for AFOLU activities in Djibouti between 2010 – 2022 (19.3% of total climate funding). All of this funding was provided as grants.

The GEF project database notes that to date, the GEF has funded 12 projects in Djibouti (this includes two enabling activities, nine full-sized projects, and one

medium-sized project). AFOLU related projects include:

- **Supporting Rural Community Adaptation to Climate Change in Mountain Regions of Djibouti** – The objective of this project was to reduce the vulnerability of the inhabitants of mountainous regions of Djibouti to climate change impacts, through institutional strengthening, climate-smart water management and targeted investment. GEF funding for this project was a grant of USD 5.38 million (approved in 2014).
- **Planning and implementing Ecosystem based Adaptation (EbA) in Djibouti's Dikhil and Tadjourah regions** – The objective of this project is to increase the capacity of local communities in Gobaad Plain and Tadjourah Ville to adapt to climate change. GEF funding for this project was a grant of USD 8.92 million (approved in 2022).

All GEF funding is channelled through one of 18 implementing agencies that the facility uses (these are mostly multilateral agencies). Implementing agencies for GEF funded projects in Djibouti include the African Development Bank, UNDP, UNEP, and the World Bank.

World Bank

According to our analysis of the OECD DAC data, the World Bank allocated USD 20.43 million in climate funding for AFOLU activities in Djibouti between 2010 – 2022 (13.1% of total climate funding). Of this total, USD 11.74 million (57.5%) was provided as debt instruments, and USD 8.68 million (42.5%) was provided as grants.

According to the World Bank finance summary for Djibouti, in the period 2010 – 2022, the World Bank disbursed USD 148 million in funding to Djibouti (all of which was via the International Development Association). It is unclear however how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

A review of the World Bank project database found that between 1st January 2010 and 31st December 2022, funding was approved for five projects which had an AFOLU focus. Total World Bank funding commitment for these projects was USD 45.8 million. For the majority of projects World Bank funding was channelled via a national government ministry. It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 68 million in project funding to Djibouti. To date, all of the project funding to Djibouti has been through six multi-country programmes, which span several sectors.

Our analysis found that three of these programmes had relevance to the AFOLU sector, and that for this group, GCF funding allocated to Djibouti totalled USD 46.6 million (approximately 68.5% of the total GCF funding allocated to Djibouti). Across these five projects and programmes, our analysis estimates that USD 2.1 million has been disbursed to date, this is 4.5% of the estimated funding allocated to AFOLU.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF has approved USD 1.6 million in readiness funding to Djibouti,

across five readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusions

- Our analysis of climate-related development finance to AFOLU activities in Djibouti found no noticeable trends in overall finance flows. The allocated funding varied widely across the years under analysis, with some years no, or very little funding was allocated to AFOLU projects.
- Although Djibouti's NDC does not provide specific projects for AFOLU-related funding needs. It is likely, given the importance of agriculture to the national economy, that AFOLU needs are likely to account for a significant share of the total funding needs – particularly in the case of adaptation. On this basis, it can be inferred that there is a substantial funding gap between the likely climate finance needs for AFOLU and the existing flows. For example total adaptation needs for Djibouti's NDC (across all sectors) are projected to be between USD 833 million and USD 1.33 billion. Our analysis of the OECD DAC data found that total funding allocated to AFOLU projects in Djibouti was just USD 155.4 million between 2010 – 2022.
- On a more positive note, the majority of funding (84.5%) allocated for AFOLU activities has been in the form of grants. This indicates that the funding allocated to Djibouti is highly concessional.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or international organisations. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

ERITREA

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Eritrea's Nationally Determined Contribution (NDC) for the period 2018 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Eritrea's climate policies. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture ranged from 67.6% in 2010 to 64% in 2022. The agriculture sector accounts for about 26% of GDP. Agriculture in Eritrea mainly depends on rainfed production, and is highly vulnerable to the impacts of climate change. Eritrea's NDC has set out both adaptation and mitigation priorities for the AFOLU sector, a summary of these and projected costs are shown in table 1 (below).

Table 1. Summary of AFOLU interventions and projected costs in Eritrea's Nationally Determined Contribution (2020 – 2030)

Adaptation / Mitigation	Objectives	Funding needs USD (billions)
Adaptation	Adaptation priorities in the AFOLU sector include: • Promotion of conservation agriculture • Irrigation 170,000 ha • Afforestation (36,000 ha). • Terrestrial and marine protected areas over 1.5 million ha • Rehabilitation of degraded land for agriculture (250,000 ha) • Livestock productivity increased by 75% • SLM practices implemented in 15% of Eritrea's total land area.	USD 4.82 billion (for conditional targets). This is broken down into USD 3.73 billion for agriculture and forestry, and USD 552 million for land.
Mitigation	Mitigation objectives for the AFOLU sector are entirely forestry focused and include reforestration with agroforestry and silvopasture.	Mitigation costs for AFOLU are not specified, however overall mitigation costs (across all sectors) are USD 3.5 billion.
Total		**Minimum of USD 4.2 billion for conditional targets**

Source: The State of Eritrea (March 2018), Nationally Determined Contributions Report to the UNFCCC

2. Analysis of climate finance flows to Eritrea (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Eritrea during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 129.96 million was allocated to AFOLU-related activities in Eritrea. On a year-by-year basis, allocated funding has ranged from USD 0 to a peak of USD 29 million (in 2020).

As indicated in Figure 1 (below), AFOLU funding in this period was mostly allocated in the form of grants (94.3%), with the remaining 5.7% being through loans and other debt-related instruments.

Figure 1. Eritrea – Share of total AFOLU climate finance by instrument (2010 – 2022)

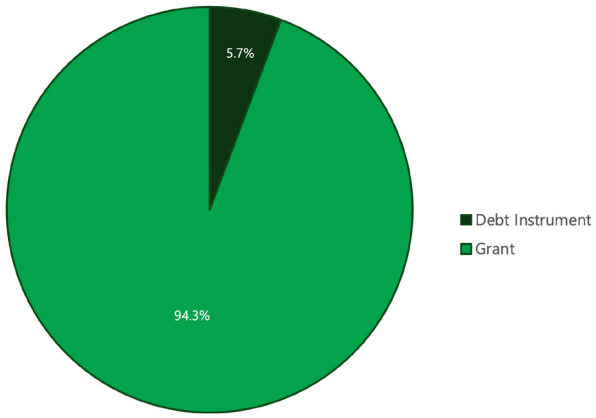
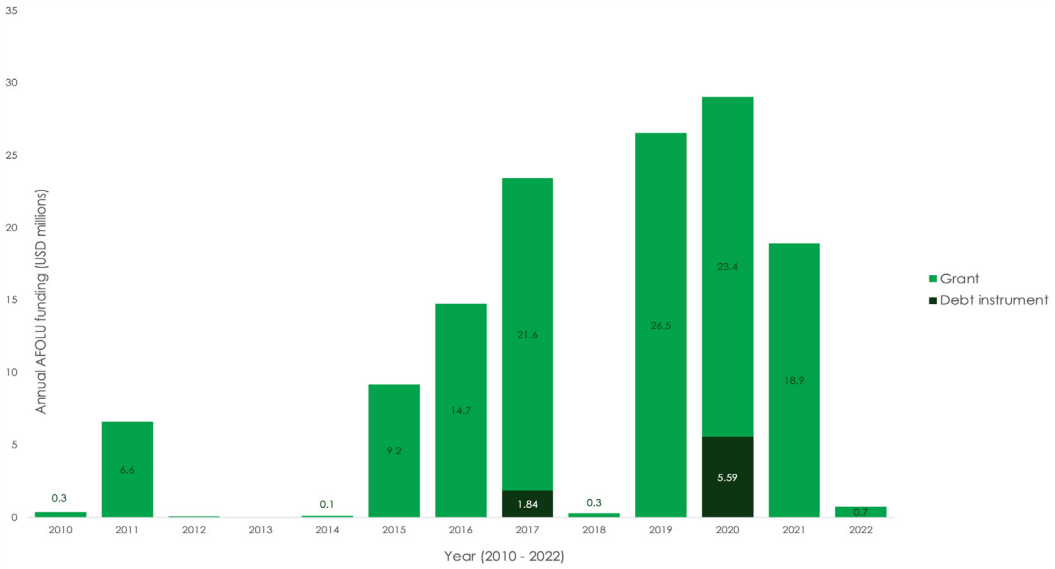


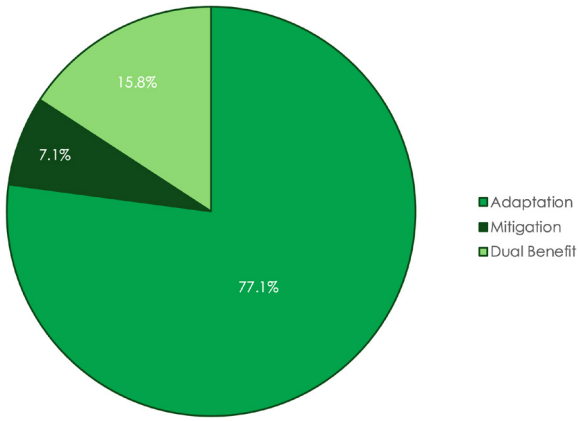
Figure 2. Eritrea – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3, most funding in this period (77.1%) was allocated to adaptation interventions. There is still a significant funding gap, total funding captured by the OECD DAC data was USD 100.2 million between 2010-2022. In

the years that overlap with Eritrea's NDC (2018-2022), total adaptation funding allocated to AFOLU was USD 55.13 million. This is a tiny fraction (approximately 1.5%) of the conditional projected climate finance needs for Eritrea's adaptation objectives (which are projected to cost USD 3.7 billion between 2018-2030).

Figure 3. Eritrea – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of Eritrea that are employed in agriculture), funding is largely below the regional average (for all 15 countries included in this analysis). There were only four years (2011, 2017, 2019, and 2020) where per capital funding for Eritrea was in line with, or above the regional average.

Between 2010-2022, 11.1% of the AFOLU-related funding allocated to Eritrea was for projects that had a significant gender focus. Only 0.2% of the funding in this period was for projects which had gender as the principal focus. 1.2% of the funding was not targeted at gender, and the remaining 87.5% of funding did not specify the gender focus.

Figure 4. Eritrea – Annual per capita AFOLU climate funding to population employed in agriculture (2010 – 2022). National average vs regional average

The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of the these elements, our analysis included a review of the project databases of the main providers of finance to Eritrea. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 96.4% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Eritrea were as follows: National Governments received 49.58% of total funding; The United Nations Development Programme, and the UN Food and Agriculture Organisation each received 19.79% and 13.62% respectively; the International Fund for Agricultural Development received 8.67%; and the remainder went to a variety of other public sector institutions and international agencies. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 1. Eritrea – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	African Development Bank	40.23	31.0%
2	Global Environment Facility	37.79	29.1%
3	International Fund for Agricultural Development	29.12	22.4%
4	Germany	11.54	8.9%
5	Adaptation Fund	6.52	5.0%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

African Development Bank

According to our analysis of the OECD DAC data, the African Development Bank allocated USD 40.23 million in climate funding for AFOLU activities in Eritrea between 2010 – 2022 (31% of total climate funding). Of this funding, USD 38.39 million (95.4%) was grant funding, and the remaining USD 1.84 million (4.6%) was as debt instruments.

The AfDB's intervention strategy in Eritrea promotes climate smart agriculture to reduce the adverse effects of climate change, boost productivity, ensure food security and improve livelihoods for most Eritreans who depend on agriculture. Relevant AfDB projects in Eritrea include:

- **Drought Resilience and Sustainable Livelihoods Programme** - the project interventions will support activities to rebuild existing livelihoods through investment in integrated land management and management and also investment in agricultural and water infrastructure . Gender will be mainstreamed in all the components of the project including the promotion of water infrastructure with gender sensitive feature and inclusion of women in the natural resources management structures. Total financing for this project was USD 5.3 million (approved in 2017).

Global Environment Facility

According to our analysis of the OECD DAC data, the Global Environment Facility allocated USD 37.79 million in climate funding for AFOLU activities in Eritrea between 2010 – 2022 (29.1% of total climate funding). All of this funding was provided as grants.

The GEF project database notes that to date, the GEF has funded 19 projects in Eritrea (this includes 9 enabling activities and 10 full-sized projects). AFOLU related projects include:

- **The Sustainable Land Management Pilot Project** – The objective of this projects was to create the enabling environment (policy, capacity, knowledge, alternatives) necessary for adoption of sustainable land management practices and alleviate environmental degradation while improving livelihoods of the farming communities of the Central Highland Zone (CHZ). GEF funding for this project was a grant of USD 1.82 million (approved in 2009).
- **Restoring Degraded Forest Landscapes and Promoting Community-based, Sustainable and Integrated Natural Resource Management in the Rora Habab Plateau, Nakfa Sub-zoba, Northern Red Sea Region of Eritrea** – The objective of this project is to promote landscape restoration and mainstream sustainable land management, forestry and biodiversity conservation into land-use planning and agricultural production practices in the Rora Habab Plateau in Eritrea. GEF funding for this project was a grant of USD 8.26 million (approved in 2018).
- **Building Community Based Integrated and Climate Resilient Natural Resources Management and Enhancing Sustainable Livelihood in the South-Eastern Escarpments and Adjacent Coastal Areas of Eritrea** – The objective of this project is to enhance resilience of vulnerable agro-pastoralist and fishing communities along degraded landscapes/ seascapes in the south-eastern escarpments and adjacent coastal areas of Eritrea through an integrated ecosystem-based and market-driven approach. GEF funding for this project was a grant of USD 15.68 million (approved in 2022).

All GEF funding is channelled through one of 18 implementing agencies that the facility uses (these are mostly multilateral agencies). Implementing agencies for GEF funded projects in Eritrea include FAO, UNDP, UNEP, and the World Bank.

International Fund for Agricultural Development

According to our analysis of the OECD DAC data, IFAD allocated USD 29.12 million in climate funding for AFOLU activities in Eritrea between 2010 – 2022 (22.4% of total climate funding). Of this funding, USD 23.53 million (79.8%) was grant funding, and the remaining USD 5.86 million (20.2%) was as debt instruments.

The IFAD webpage for Eritrea notes that IFAD has provided USD 149.91 million in financing to Eritrea across eight projects.

In Eritrea, recurrent droughts and climate shocks have made the management of natural resources a priority. IFAD loans build the resilience of rural people and the ecosystems from which they secure their livelihoods. Activities target areas of the country where rural poverty is most severe and where social and economic infrastructure has been seriously disrupted by conflict.

IFAD's strategy for Eritrea is set out in the Eritrea Country Strategic Opportunities Programme 2020-2025. IFAD projects and programmes integrate climate change adaptation and climate-resilient conservation to improve crop and livestock production, and thus nutrition. IFAD's strategy is aimed at supporting rural communities to transition from reconstruction and rehabilitation to structured development.

Key activities include:

- expanding production, processing and marketing of higher-value crops;
- building skills and raising awareness among women and youth on fishing, fish processing and marketing;
- increasing fish production and incomes for small-scale fishers, fish processors and traders;
- supporting rangeland management, crop and animal husbandry, veterinary services and conservation farming; and
- using climate-smart technologies and services to enhance productivity, profitability and sustainability of smallholder agricultural and fisheries systems.

Notable IFAD projects and programmes in Eritrea include:

- **The Integrated Agriculture Development Project** – IADP's goal is to contribute to poverty reduction and food and nutrition security in rural households. The project's development objective is to enhance smallholder agricultural production and productivity in a sustainable and climate-resilient manner and to improve rural livelihoods. IADP will directly benefit some 60,000 rural households, i.e. more than 300,000 people, of which 40 per cent will be women and 40 per cent youth. This programme is being implemented between 2020 – 2028. The total cost of this initiative is USD 50.27 million, with IFAD providing USD 37.05 million, All of the funding is in the form of Debt Sustainability Framework (DSF) grants.
- **The Fisheries Resources Management Programme** - FReMP will support the establishment of infrastructure and technologies for production, post-harvest operations and marketing of both marine and inland fisheries. It will also promote the development and capacity building of cooperatives and other enterprises and ensure that they have access to the requisite tools to undertake economically viable and sustainable fish-related businesses. The programme is expected to transform Eritrea's small-scale fisheries sector from subsistence to a sustainable commercial fish industry. This programme is being implemented between 2016 – 2024. The total cost of this initiative is USD 29.82 million, with IFAD providing USD 15 million, All of the funding is in the form of Debt Sustainability Framework (DSF) grants.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 8.8 million in project funding to Eritrea. This has all been via one multi-country programme – the Inclusive Green Financing Initiative (IGREENFIN I). To date, only 4% of the funding for this programme has been disbursed across all countries. Assuming an equal share of disbursed funding across all the countries in the

programme, our analysis estimates that only USD 350,000 has been disbursed so far.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF has approved USD 3.5 million in readiness funding to Eritrea, across three readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusion

- Our analysis of climate-related development finance allocated to AFOLU activities in Eritrea found that year-on-year, funding allocations generally increased, peaking at USD 28.99 million in 2020, but annual funding allocations have since decreased. Based on the climate finance needs for AFOLU outlined in Eritrea's NDC (which in total amount to USD 4.2 billion for adaptation – an average of USD 420 million per year until 2030), there is a significant gap between climate finance needs, and current allocations.
- On a more positive note, the majority of funding (94.3%) allocated for AFOLU activities has been in the form of grants. This indicates that the funding allocated to Eritrea is highly concessional.
- On a per capita basis, the funding received by agricultural workers was almost always below the regional averages. This was the case in all but three years during the period under consideration.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- AFOLU funding allocated to projects in Eritrea was highly concentrated, with five institutions accounting for 96.4% of all funding allocated between 2010 – 2022.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or international organisations. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

ETHIOPIA

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Ethiopia's Nationally Determined Contribution (NDC) was published in 2021 and establishes targets which are to be achieved by 2030. Agriculture is a key sector within Ethiopia's economy. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture ranged from 73.8% in 2010 to 62.8% in 2022. Whilst overall share of the population employed in agriculture is falling, the sector remains a key source of employment. Agriculture in Ethiopia is highly vulnerable to the effects of climate change. The AFOLU sector is prioritised with Ethiopia's NDC, which outlines a variety of adaptation and mitigation objectives (see table 1 below).

The total climate finance needs for implementing all objectives in Ethiopia's NDC total USD 316 billion. This is broken down into USD 275.5 billion for mitigation objectives and an additional USD 40 billion for adaptation. 80% of total financing needs are conditional (depending on international climate finance). Ethiopia's NDC does not provide a breakdown of financial needs for priority intervention areas.

Additionally, Ethiopia's National Adaptation Plan (NAP-ETH), has identified 18 adaptation areas which will be implemented across the country. These include:

- Enhancing food security through improving agricultural productivity in a climate smart manner.
- Strengthening sustainable natural resources management through safeguarding landscapes and watersheds.
- Developing efficient value chain and marketing system.
- Strengthening drought, livestock and crop insurance mechanisms.
- Improving soil water harvesting and water retention mechanisms.
- Improving ecosystem resilience through conserving biodiversity.
- Enhancing sustainable forest management.

The objectives established in NAP-ETH are to be implemented between 2016-2030. The total finance needs across the 18 adaptation areas are USD 90 billion (an average of USD 6 billion per year).

Table 1. Summary of AFOLU interventions and projected costs in Ethiopia's Nationally Determined Contribution

Intervention area	Objectives	Funding needs FCFA (billions) and USD (millions)
Adaptation	AFOLU related adaptation actions are divided across agriculture (8 interventions), forestry (5 interventions); and land use (2 interventions).	Adaptation interventions outlined in Ethiopia's NDC are projected to cost USD 40 billion.

Intervention area	Objectives	Funding needs FCFA (billions) and USD (millions)
	Adaptation interventions in the AFOLU sector will be complemented with strategic actions in other sectors such as water, energy, transport, health, urban settlements, and disaster risk reduction.	
Mitigation	Mitigation objectives for the AFOLU sector are broken down into components for the Land Use Change and Forestry (LUCF); Livestock; and Managed Soils; sectors.	Mitigation funding needs are USD 275.5 billion.
Total		**USD 316 billion**

2. Analysis of climate finance flows to Ethiopia (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Senegal during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 6.75 billion was allocated to AFOLU-related activities in Ethiopia. This makes it the country which has been allocated the greatest total volume of climate-related development finance for AFOLU activities between 2010-2022, out of the 15 countries covered in this analysis. On a year-by-year basis, the highest amount of annual funding allocated to AFOLU activities in Ethiopia was in 2022 (USD 1.231 billion). The lowest annual funding recorded in this period USD 97.39 million in 2011.

As indicated in Figure 1 (below), the majority of climate finance allocated to Ethiopia for AFOLU related activities was in the form of grants (83.4% of total funding). The remaining 16.6% was in the form of debt instruments. Less positively, as illustrated in Figure 2, the use of debt instruments as a share of total annual funding has increased since 2016. In most years between 2016 – 2022, debt has been between 19% - 30% of total funding. The only exception in this period was 2021, where debt instruments only accounted for 0.5% of total funding for AFOLU funding allocated to Ethiopia.

Figure 1. Ethiopia – Share of total AFOLU climate finance by instrument (2010 – 2022)

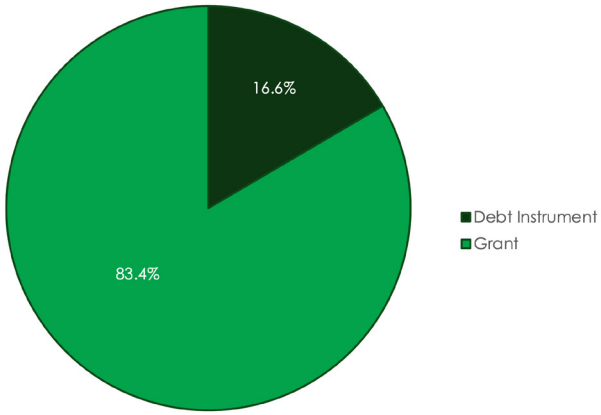
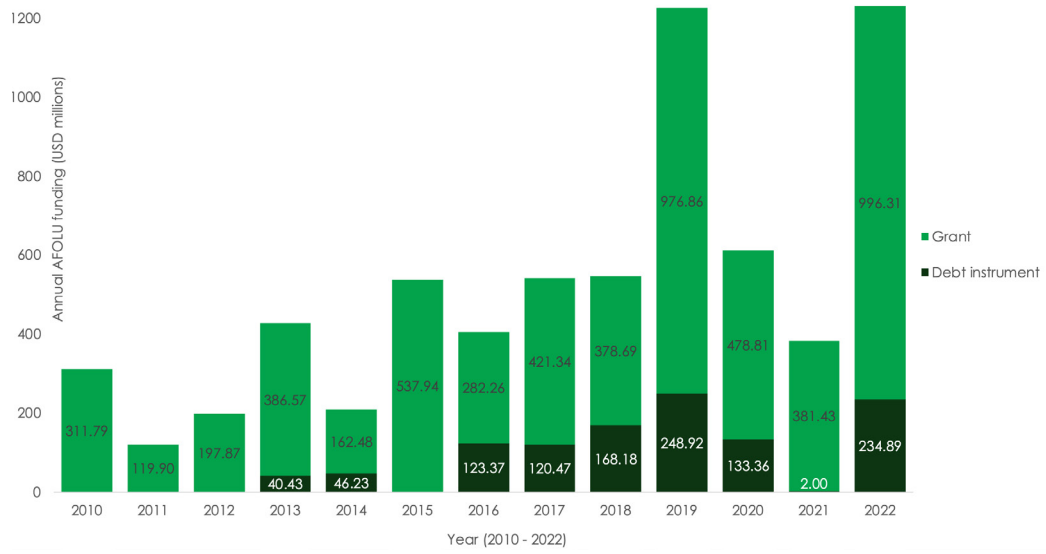


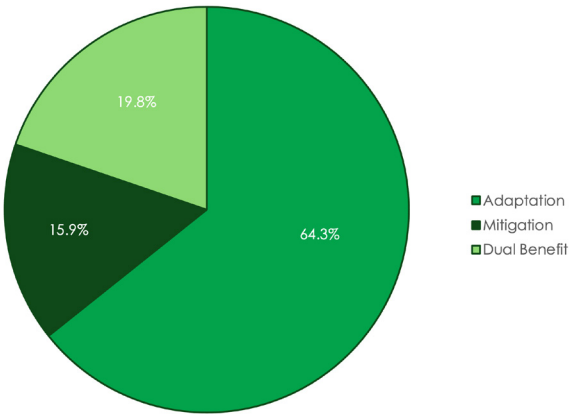
Figure 2. Ethiopia – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3, the majority of funding (64.3%) allocated to Ethiopia was for adaptation projects, in total this was USD 4.34 billion. Ethiopia's NDC and NAP do not provide a breakdown of climate finance needs per sector, however given the significance of agriculture to the national economy (it accounts more than 35% of GDP and employs more than 60% of the population[1]) the funding needs for the AFOLU sector are likely to account for a significant share of finance needs. Given that the overall cost of implementing adaptation targets in Ethiopia's NDC is estimated at USD 40 billion, it is likely that funding levels are below those required.

Figure 3 also shows that mitigation only received 15.9% of total AFOLU related funding between 2010 and 2022, a total of USD 1.07 billion. Assuming again that AFOLU related interventions account for a significant share of the overall funding needs of USD 275.5 billion, it appears that current finance flows will be insufficient to meet Ethiopia's mitigation objectives.

Figure 3. Ethiopia – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



1 World Bank Data (2022)

As shown on in Figure 4 (below), on a per capita basis (to the population of Ethiopia that are employed in agriculture), over the period 2010-2022, annual per capita funding has generally been in line with the regional average. There are three years where the average per capita funding has deviated from the regional average: 2019, where the per capital funding levels were approximately USD 5 higher than the regional average; and 2021 and 2022, where per capita funding was significantly lower than regional averages.

Between 2010-2022, 42.9% of the AFOLU-related funding allocated to Ethiopia was for projects that had a significant gender focus. 14.7% was allocated for projects with no gender focus, 9.1% was allocated to projects where gender was the principal focus. The remaining 33.4% of funding was to projects where the gender focus was unspecified.

Figure 4. Ethiopia – Annual per capita AFOLU climate funding to population employed in agriculture (2010 – 2022). National average vs regional average

The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of the these elements, our analysis included a review of the project databases of the main providers of finance to Ethiopia. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 65.1% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Ethiopia were as follows: National Governments received 45.58% of total funding; NGOs based in the country providing the funding received 14.88%; The International Bank for Reconstruction and Development (IBRD) received 6.67% of allocated funding; The World Food Programme received 3.67%; and the

World Bank 3.41%. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 2. Ethiopia – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	World Bank	2,043.82	30.3%
2	United States	738.78	10.9%
3	Germany	659.05	9.8%
4	Netherlands	526.90	7.8%
5	Norway	426.46	6.3%

3. Analysis of projects funded by the three main providers of climate finance between 2010-22

World Bank

According to the World Bank finance summary for Ethiopia, in the period 2010 – 2022, the World Bank disbursed USD 14.751 billion in funding to Ethiopia (all of which was via the International Development Association). It is unclear however how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

According to our analysis of the OECD DAC data, the World Bank allocated USD 2.043 billion in climate funding for AFOLU activities in Ethiopia between 2010 – 2022 (30.3% of total climate funding). Of this, USD 1.28 billion (62.5%) was in grant funding , and the remaining USD 766.5 million (37.5%) was in via debt instruments.

A review of the World Bank project database found that between 1st January 2010 and 31st December 2022, the World Bank approved USD 3.42 billion in funding for AFOLU projects in Ethiopia. All of this funding was channelled via one of the Federal Government Ministries in Ethiopia. It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

The World Bank Group is one of Ethiopia's largest providers of development finance. Ethiopia currently receives over USD 2 billion in concessional financing each year from IDA with roughly half of this as grants. IDA commitments now stand at USD 15.5 billion, with almost USD 7 billion available to disburse. Key initiatives in the AFOLU sector include:

- **The Second Agricultural Growth Project -** The development objective of the Second Agricultural Growth Project for Ethiopia is to increase agricultural productivity and commercialization of small holder farmers targeted by the project. The project includes five components. The first component, agricultural public support services will increase access to public agricultural services for smallholder farmers. The second component, agricultural research will increase the supply of demand-driven agricultural technologies which directly link to

the other components. The third component, small scale irrigation will increase the access to and efficient use of irrigation water by smallholder farmers. The fourth component, agriculture marketing and value chains will commercialize smallholder farmers through increased access to input and output markets. The fifth component is on M&E. To date the World Bank has approved more than USD 602.5 million in funding for this project (which is being implemented by the Ministry of Agriculture).

- **Second Ethiopia Resilient Landscapes and Livelihoods Project** - The development objective of Second Resilient Landscapes and Livelihoods Project (RLLP II) for Ethiopia to improve climate resilience, land productivity and carbon storage, and increase access to diversified livelihood activities in selected rural watersheds. To date the World Bank has committed USD 178.24 million to this project (which is being implemented by the Ministry of Agriculture).

In July 2024, the World Bank approved USD 1.5 billion in funding - including a USD 1 billion grant and USD 500 million concessional credit from the International Development Association – for the Ethiopia First Sustainable and Inclusive Growth Development Policy Operation. This policy operation supports home-grown reforms that will ultimately help the country transition to a more inclusive economy that allows the private sector to contribute more strongly to growth. While strengthening the financial sector, expanding trade options, and improving fiscal transparency, this engagement will also boost protections for poor and vulnerable households during periods of economic change. The operation also helps promote sustainable land and forest management.[2]

United States

According to our analysis of the OECD DAC data, the United States of America allocated USD 738.8 million in climate funding for AFOLU activities in Ethiopia between 2010 – 2022 (10.9% of total climate funding). All of this funding was provided as grants.

According to the US Foreign Assistance database, between 2010 and 2022, the United States Government allocated a total of USD 569.8 million for agriculture in Ethiopia, of this total USD 507.72 million (89.1%) was disbursed. It is not clear from the database what proportion of this funding was climate-related.

USAID is supporting Ethiopia's development and climate priorities, including promotion of sustainable forest, agricultural, and community land management practices. Key programs include:

- **USAID/Ethiopia Biodiversity and Community Resilience in the Omo Valley Activity** improves biodiversity, livelihood security, and human rights in Ethiopia's Lower Omo through community-based conservation, ecotourism, and regenerative agriculture, as well as capacity building for political advocacy
- **Feed the Future Ethiopia Highlands Resilience Activity** supports highland communities and households to strengthen their climate resilience and to pursue sustainable livelihoods that adapt to climate change impact
- **Feed the Future Ethiopia Land Governance Activity** supports pastoral communities to get communal land titling and to use their land based on participatory land use plans.

2 World Bank (30th July 2024), World Bank Backs Ethiopia's Reforms to Promote Sustainable and Inclusive Growth, Enhance Resilience, and Take Climate Action

Community land governance entities managed the use of land by enforcing bylaws approved by community members. This ensures a sustainable landscape helping to exercise climate smart agriculture, protect the environment and improve agriculture productivity.

- **Feed the Future Ethiopia Transforming Agriculture Activity** is working with farmers and agribusinesses to develop a more resilient, sustainable agricultural market system. This will result in more affordable, safe, and healthy diets through a more productive, resilient agriculture system.
- **USAID's Health, Ecosystems, and Agriculture for Resilient, Thriving Societies Program** invests in sustainable conservation of threatened landscapes and the well-being and prosperity of communities that rely on those landscapes. By working with local communities, USAID community-led conservation efforts that promote biodiversity and local development.

Germany

According to our analysis of the OECD DAC data, Germany allocated USD 659 million in climate funding for AFOLU activities in Ethiopia between 2010 – 2022 (9.8% of total climate funding). All of this funding was provided as grants.

Development cooperation between Germany and Ethiopia focuses on the following three core areas:

1. Transformation of agricultural and food systems
2. Sustainable economic development, training and employment
3. Conserving nature and natural resources, protecting life on Earth

In Ethiopia, support from Germany is mainly provided by GIZ, on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ).

GIZ assists Ethiopia's private sector by developing the capacities of micro, small and medium-sized enterprises, promoting start-ups and implementing social and environmental standards in industrial parks. In addition, GIZ promotes environmentally friendly and socially responsible land use, climate-sensitive land management and sustainable soil use. At the same time, it contributes to increasing the productivity of smallholder farms in areas such as coffee, avocado and soy.

The GIZ project database shows that it is currently implementing a total of 76 projects in Ethiopia, with a total value of EUR 666.9 million. Seven of these projects have a focus on agriculture and the environment. Notable examples include:

- **Sustainable Land Use for Economic Development (SURED)** – the objective of this project is to enhance the capacity of smallholder farmers to adopt sustainable land management practices. It is being implemented with the Ministry of Agriculture and Natural Resources. (Total financial commitment is EUR 92.78 million)
- **Agricultural Mechanisation and Technology for Smallholder Productivity**
- **Strengthening Drought Resilience of Pastoral and Agro-Pastoral Livelihoods in Ethiopian Lowlands**
- **Strengthening Rural Value Chains**

Beyond Ethiopia, GIZ supports the Intergovernmental Governmental Authority on Development (IGAD), a regional organisation in East Africa, with migration and displacement policy, climate resilience, conflict resolution and pandemic preparedness. GIZ also cooperates with the African Union (AU), which is based in Ethiopia. On behalf of BMZ and the Federal Foreign Office, it implements projects on agriculture, education, peace and security, regional

economic integration and good governance.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 327.3 million in project funding to Ethiopia. This funding is spread across 9 projects and programmes which span multiple sectors (including several multi-country programmes which include Ethiopia).

Our analysis found that five of these projects and programmes had relevance to the AFOLU sector, and that for this group, GCF funding allocated to Ethiopia totalled USD 254.01 million (approximately 77.6% of the total GCF funding allocated to Ethiopia). Across these five projects and programmes, our analysis estimates that USD 98.09 million has been disbursed to date, this is 36.6% of the estimated funding allocated to AFOLU.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF has approved USD 4.5 million in readiness funding to Ethiopia, across five readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusion

- Our analysis of climate-related development finance allocated to AFOLU activities in Ethiopia found that year-on-year, funding allocations for AFOLU have remained fairly steady at between USD 500 – 600 millllion per year since 2015. In this period there were two years with significant funding increases, both 2019 and 2022 saw funding allocation levels increase to over USD 1.2 billion.
- Climate finance requirements for the AFOLU objectives set out in Ethiopia's NDC are approximately USD 316 billion by 2030. Based on our analysis of the OECD DAC database, the current annual total allocations for AFOLU projects in Ethiopia will be insufficient to meet these needs. The funding gap is particularly significant for mitigation finance needs. Mitigation finance needs outlined in Ethiopia's NDC total USD 275.5 billion by 2030. Based on our analysis of the OECD data, mitigation only accounted for 15.9% of AFOLU related funding allocations between 2010-2022. In 2022 funding allocations for AFOLU projects with a mitigation focus totalled USD 173.64 million, this is less than 1% of the average annual climate finance needs for mitigation in the AFOLU sector - which are USD 27.55 billion per year (based on an equal allocation of the total of USD 275.5 billion over a ten-year period).
- Between 2010 – 2022, the majority of AFOLU-related climate finance (83.4%) was allocated as grants. On a less positive note however, the annual share of debt-related funding

has been on the rise since 2016, accounting for between 20% - 30% in five out of seven years. This trend is problematic given that the IMF classifies Ethiopia as being in debt distress[3].

- On a per capita basis, the funding received by agricultural workers in Ethiopia has generally followed a similar pattern to the regional average. The only major diversions were in 2019 (when per capita funding in Ethiopia was above the regional average) and 2021 (where it fell significantly below).
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or international organisations. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

3 Climate Policy Initiative (October 2024), Landscape of Climate Finance in Africa

KENYA

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Kenya's Nationally Determined Contribution (NDC) for the period 2020 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Kenya's climate agenda. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture ranges between 32% - 40%. Despite a downward trend in the overall share of the population employed in agriculture, the sector still accounts for about a third of Kenya's workforce.

A summary adaptation and mitigation objectives for the AFOLU sector presented in Kenya's NDC are summarised below. According to Climate Policy Initiative, the AFOLU related finance needs for Kenya's NDC are as follows. Agriculture, fisheries and livestock (USD 5.27 billion); forest, tourism and wildlife (USD 1.18 billion); and environment, devolution and solid waste management (USD 533.77 million). In total this is approximately USD 7 billion[1].

In Kenya's National Adaptation Plan, climate finance needs are provided for land reforms (USD 1.39 million); environment (USD 636.15 million); agriculture (USD 375 million); livestock development (USD 300 million); and fisheries (USD 136.86 million). Combined, these subsectors make the total AFOLU needs USD 1.45 billion.

Table 1. Summary of AFOLU interventions and projected costs in Kenya's Nationally Determined Contribution

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
Adaptation	Adaptation targets for AFOLU sector are: • Mainstreaming CSA • Build resilience of agriculture systems through sustainable land management • Strengthen communication systems on CSA extension and agro-weather issues • Rehabilitation and conservation of degraded forests • Establish at least 2,000 ha to promote nature based enterprises across the country • Establish 150,000 ha commercial private forest plantations. • Plant 350,000 agroforestry trees in farmland	Kenya's NDC does not specify the adaptation finance needs for the AFOLU sector. Kenya's National Adaptation Plan (2015 – 2030) sets total adaptation finance needs at USD 1.45 billion.

1 Figures are taken from CPI (March 2021), Landscape of Climate Finance in Kenya. The figures in the CPI report are presented in Kenyan Shillings. Here they have been converted using the current conversion rate from KES to USD.

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
Mitigation	Mitigation objectives in the AFOLU sector include: • Making progress towards tree cover of at least 10% of the land area of Kenya • Make efforts towards achieving land degradation neutrality • Scaling up nature based solutions for mitigation • Enhancement of REDD+ activities • Climate smart agriculture inline with Kenya's CSA strategy	Not specified
Total		**AFOLU funding needs outlined in Kenya's NDC are approximately USD 7 billion (both adaptation and mitigation) by 2030.** **Total NDC finance needs (across all sectors) are USD 62 billion**

2. Analysis of climate finance flows to Kenya (2010 – 2022)

This section provides an analysis of climate finance allocated to AFOLU related activities in Kenya during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 4.17 billion was allocated to AFOLU-related activities in Kenya. In the period which aligns with Kenya's NDC implementation timeframe (2020 and 2022), the average annual funding allocated for AFOLU activities was on average USD 492.6 million per year.

On a less positive note – as shown in Figures 1 and 2 – the majority of funding allocated for AFOLU related activities in this period (56.2%) has been as debt instruments. Grant funding accounts for the next highest share (43.4% of total AFOLU funding). Of further concern, is that the proportion of debt – grant funding has been increasing throughout the period, and in the last few years has accounted for more than 70% of total annual funding allocations. Kenya is the only country in this analysis that has received funding for AFOLU via equity, however the overall share of total funding is miniscule (0.4% of total funding allocated to AFOLU in Kenya).

Figure 1. Kenya – Share of total AFOLU climate finance by instrument (2010 – 2022)

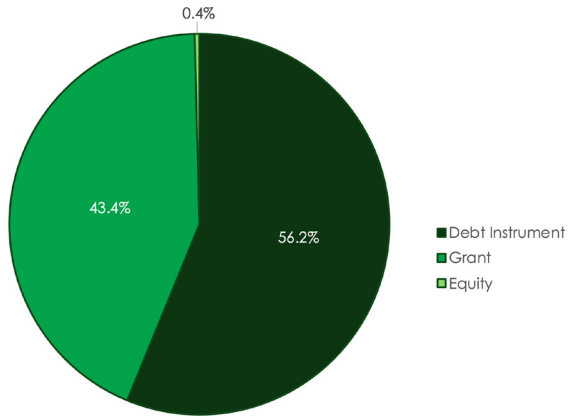
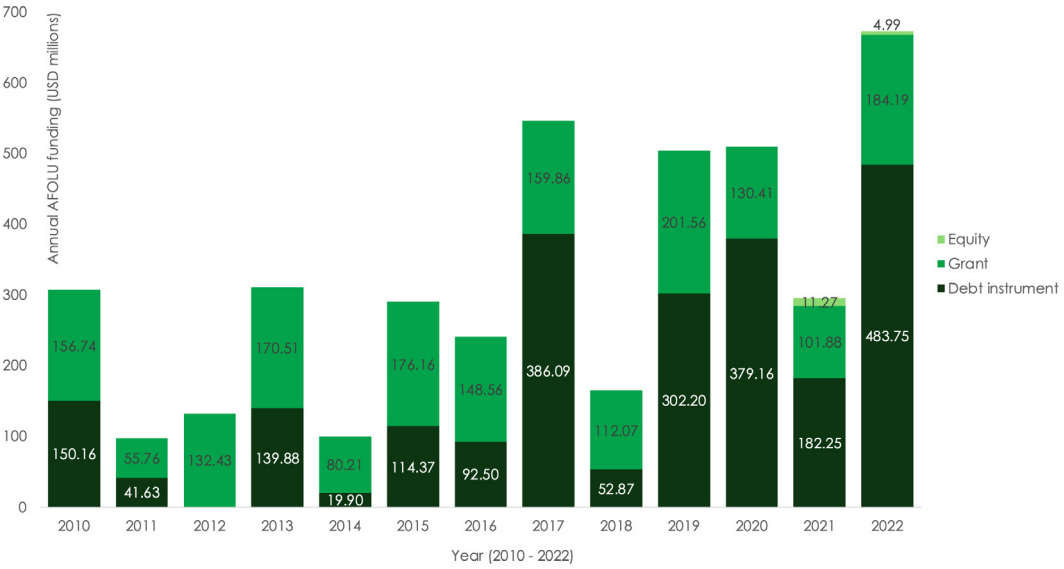
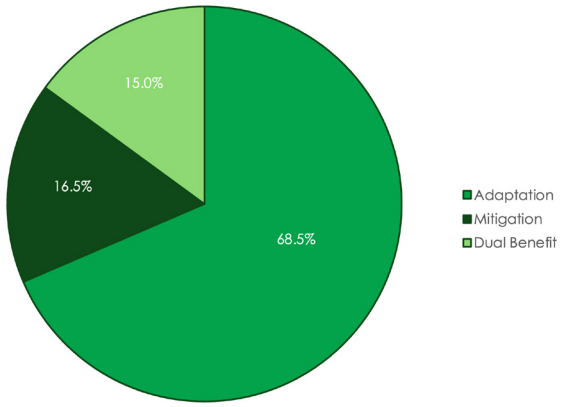


Figure 2. Kenya – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3 (below), most funding in this period (68.5%) was allocated to adaptation interventions. On a year-by-year basis, adaptation has accounted for more than 58% of annual allocated funding in all but two years (2011 and 2012). Adaptation funding accounting for a significant share of total funding is unsurprising, given the vulnerability of the agriculture sector to climate impacts.

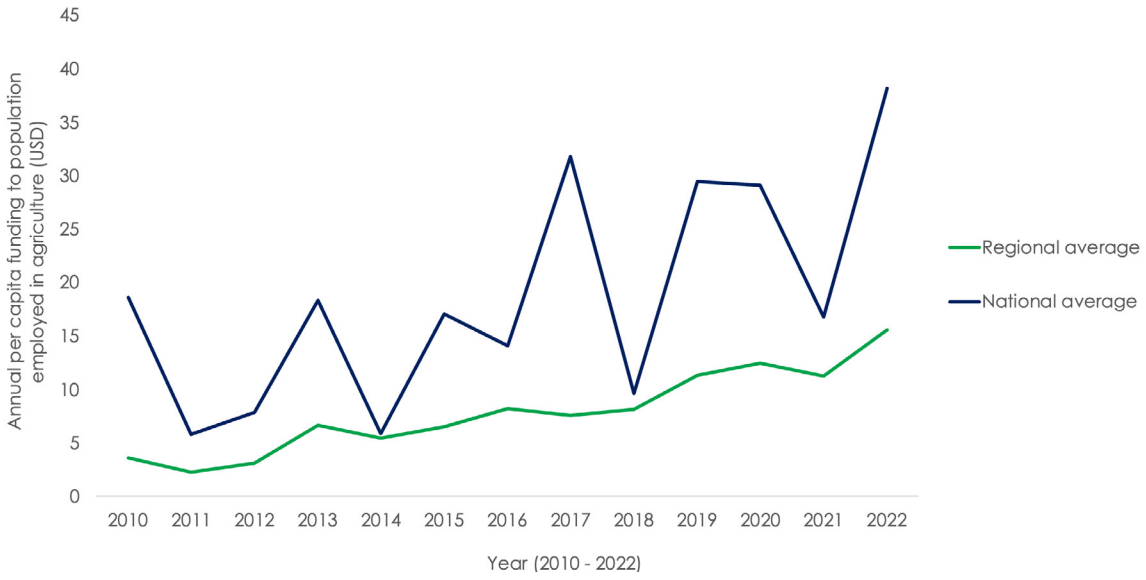
Figure 3. Kenya – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of Kenya that are employed in agriculture), funding has generally been above the regional average (for all 15 countries included in this analysis). This has been the case in every year besides 2014, where per capital funding was exactly in line with the regional average.

Between 2010-2022, 34.9% of the AFOLU-related funding allocated to Kenya was for projects that had a significant gender focus, only, 2.6% was allocated for projects where gender was the principal focus, 14.9% of funding had no gender focus, and the remaining 47.6% was for projects where the gender focus was not specified.

Figure 4. Kenya – Annual per capita AFOLU climate funding to population employed in agriculture (2010 – 2022). National average vs regional average



The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our analysis included a review of the project databases of the main providers of

finance to Kenya. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 64.4% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Kenya were as follows: National Governments received 59.21% of total funding; NGOs based in donor countries received 6.42%; 5.8% went to unspecified recipients; and the remainder was largely distributed amongst multilateral agencies, international NGOs and other public institutions. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 2. Kenya – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	World Bank	1,376.99	33.0%
2	African Development Bank	395.98	9.5%
3	EU Institutions (excluding EIB)	355.36	8.5%
4	France	279.16	6.7%
5	Germany	278.39	6.7%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

World Bank

According to our analysis of the OECD DAC data, the World Bank allocated USD 1.376 billion in climate funding for AFOLU activities in Kenya between 2010 – 2022 (33% of total climate funding). All of the funding allocated by the World Bank was in the form of debt instruments.

According to the World Bank finance summary for Kenya, in the period 2010 – 2022, the World Bank disbursed USD 8.573 billion in funding to Kenya. Of this total, USD 7.999 billion was from the International Development Assocation, and the remaining USD 575 million was from the International Bank for Reconstruction and Development (IBRD). It is unclear how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

A review of the World Bank project database found that between 1st January 2010 and 31st December 2022, funding was approved for 27 projects related to the AFOLU sectors. Examples include:

- **National Agriculture Value Chain Development Project** – The objective of the project is to increase market participation and value addition for targeted farmers in select value chains in project areas. Total World Bank funding allocated was USD 250 million.
- **Kenya Agricultural Productivity and Sustainable Land management Project (KAPSLMP)** – the objective of the project is objective is to facilitate agricultural producers in the targeted operational areas to adopt environmentally sound land management practices without reducing their incomes. The World Bank allocation was USD 10.1 million.
- **Kenya: Adaptation to Climate Change in Arid and Semi-Arid Lands (KACCAL)** – The objective of the project was to improve the ability of participating districts and communities in the arid and semi-arid lands to plan and implement climate change adaptation measures. The World Bank commitment amount was USD 5.50 million.
- **Enhancing agricultural productivity in Kenya** – World Bank funding allocation was USD 26.19 million.

For the majority of projects World Bank funding was channelled via a national government ministry (particularly the Ministry of Economy and Finance). It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

African Development Bank

According to our analysis of the OECD DAC data, the African Development Bank allocated USD 395.98 million in climate funding for AFOLU activities in Kenya between 2010 – 2022 (9.5% of total climate funding). Of this funding, USD 344 million (86.9%) was as debt instruments and the remaining USD 51.94 million (13.1%) was grant funding.

According to the African Development Bank projects database, the AfDB has funded seven AFOLU related projects since 2010, these include:

- Kenya - Rural Transformation Centres Digital Platform Project
- Kenya - Small scale irrigation and value addition project

EU Institutions

The EU Multiannual Indicative Programme (MIP) for Kenya covers the period 2021-2027 and allocates €324 million for 2021-2024.

According to our analysis of the OECD DAC data, the EU institutions allocated USD 355.36 million in climate funding for AFOLU activities in Kenya between 2010 – 2022 (8.5% of total funding). All this funding was provided as grants.

Key initiatives by the EU in Kenya include:

- Reduced emission of greenhouse gases - adoption of sustainable approaches to production, consumption, recycling, waste management and logistics
- Agri-food systems value chains - adapted to improve livelihoods, resilience and reduce impact on environment
- Increased generation of and access to renewable energy
- Conservation and restoration of natural capital and biodiversity
- Promote sustainable investments in private sectors, urbanisation, and infrastructure.

The Fourth Biennial Update Report from the European Union (2022), notes that the EU Institutions have provided funding to the following AFOLU related initiatives in Kenya:

- SWITCH Africa Green: The overall objective of the programme is to contribute to poverty reduction in Africa in the context of sustainable development through support to private sector led inclusive green growth that fosters transformation towards green economy. SWITCH Africa Green is being implemented in 6 countries: Burkina Faso, Ghana, Kenya, Mauritius, South Africa and Uganda. SWITCH Africa Green is implemented across four sectors: agriculture, integrated waste management, manufacturing and tourism.
- Ending Drought Emergencies: Support to Resilient Livelihoods and Drought Risk Management (AAP 2017).

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 323.7 million in project funding to Kenya. This funding is spread across 20 projects and programmes which span multiple sectors (including several multi-country programmes which include Kenya).

Our analysis found that eight of these projects and programmes had relevance to the AFOLU sector, and that for this group, GCF funding allocated to Kenya totalled USD 100.7 million (approximately 31.1% of the total GCF funding allocated to Kenya). Across these eight projects and programmes, our analysis estimates that USD 25.2 million has been disbursed to date, this is 25% of the estimated funding allocated to AFOLU.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF has approved USD 5.8 million in readiness funding to Kenya, across seven readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusions

- Our analysis of climate-related development finance allocated to AFOLU activities in Kenya found that year-on-year, funding allocations for AFOLU have generally been increasing. However there have been a few years with drop offs in funding allocations.
- Climate finance requirements for the AFOLU objectives set out in Kenya's NDC are approximately USD 7 billion by 2030. Based on our analysis of the OECD DAC database, the current annual total allocations for AFOLU projects in Kenya will be insufficient to meet these needs.
- Debt-related instruments have accounted for the majority of funding in this period (56.2% of total funding between 2010 and 2022). Of further concern, is that the use of debt instruments as a share of total annual funding allocated to AFOLU activities seems to be increasing –

accounting for more than 60% of total allocated funding every year since 2019, and reaching 74.4% in 2020. This is particularly problematic given that Kenya is at high risk of debt distress[2].

- On a per capita basis, the funding received by agricultural workers in Kenya has consistently been above the annual average for all 15 countries every year between 2010 – 2022.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or international organisations. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

2 Climate Policy Initiative (October 2024), Landscape of Climate Finance in Africa

MALI

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Mali's Nationally Determined Contribution (NDC) for the period 2015 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Mali's climate agenda. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture ranged from 63.1% - 73.5%, meaning that the sector is critical to the livelihoods of a large proportion of the population (particularly those living in rural areas). Additionally, as noted in Mali's NDC, agriculture is currently the highest emitting sector (although the AFOLU sector as a whole is a net sink, due to the sequestration potential of the forest sector) and is highly vulnerable to the effects of climate change. The mitigation and adaptation targets in Mali's NDC are summarised in table 1 below.

Table 1. Summary of AFOLU interventions and projected costs in Mali's Nationally Determined Contribution

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
Adaptation	Not clear	Total finance needs for adaptation are estimated at USD 8 billion. It is unclear what the total adaptation finance needs are for AFOLU.
Mitigation	Not clear	Agriculture and livestock sector estimated cost of mitigation actions are USD 315.6 million Mitigation costs for forestry sector is estimated at USD 709 million
Total		**At least USD 1 billion required for AFOLU (although unclear what the AFOLU adaptation needs are)**

2. Analysis of climate finance flows to Mali (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Mali during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 1.96 billion was allocated to AFOLU-related activities in Mali. On a year-by-year basis, allocated funding has varied, ranging from annual allocations of USD 33.3 million in 2011, to a peak of USD 365.5 million in 2021.

As indicated in Figure 1 (below), AFOLU funding in this period was mostly allocated in the form of grants (82% of total funding during the period), with the remaining 18% being through loans and other debt-related instruments. Less positively, as indicated in Figure 2, , debt-related instruments appear to account for a large proportion annual funding allocations in recent years, with the share reaching 48.8% of total funding allocated to AFOLU activities in 2022.

Figure 1. Mali – Share of total AFOLU climate finance by instrument (2010 – 2022)

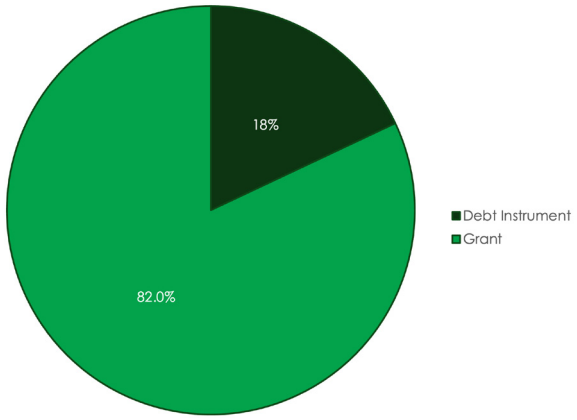
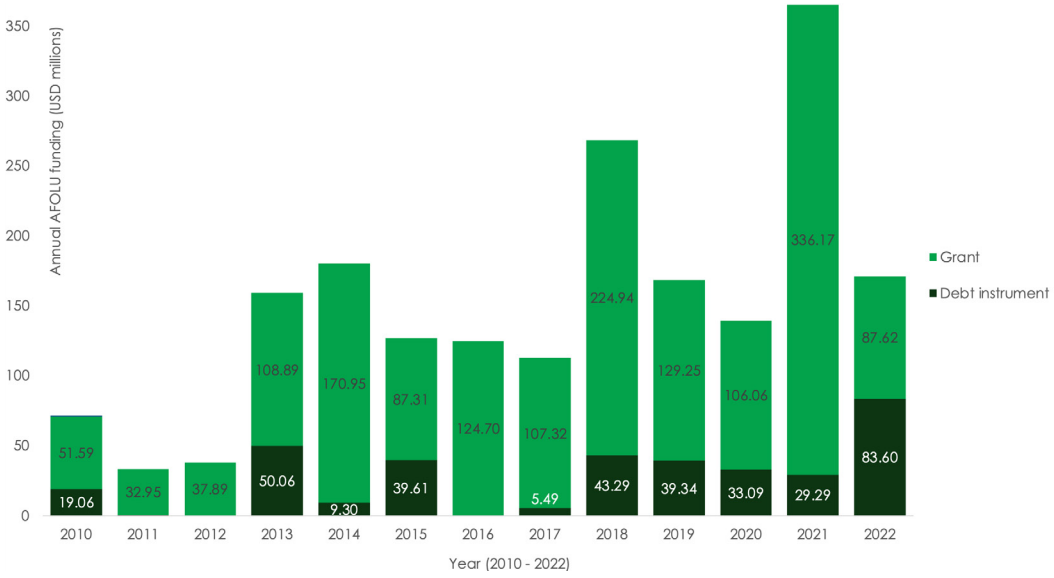
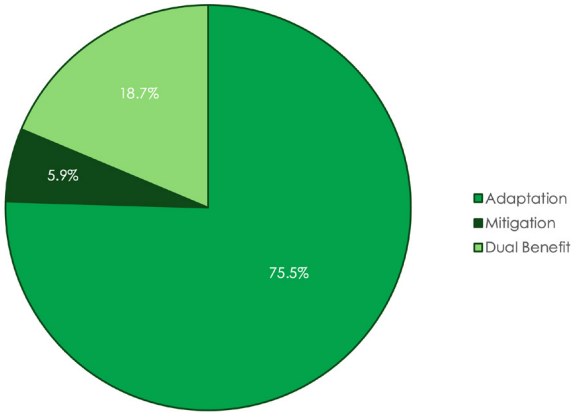


Figure 2. Mali – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3, most funding in this period (75.5%) was allocated to adaptation interventions.

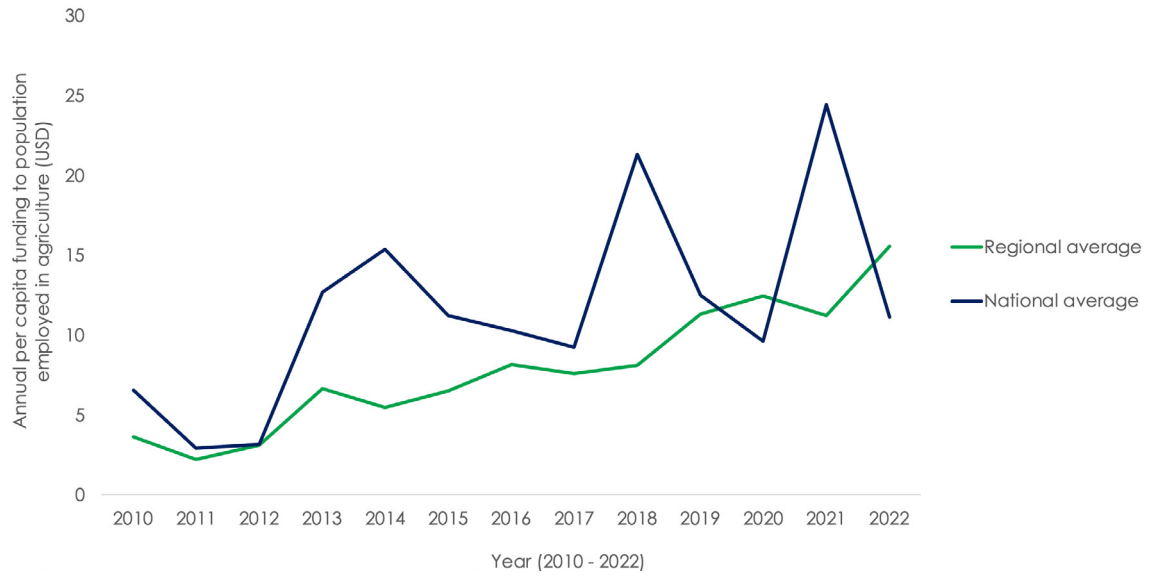
Figure 3. Mali – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of Mali that are employed in agriculture), funding is mostly aligned with or above the regional average (for all 15 countries included in this analysis). There are only two years (2020 and 2022, where per capital funding falls below the regional average).

Between 2010-2022, 54.8% of the AFOLU-related funding allocated to Mali was for projects that had a significant gender focus. 13.2% was allocated for projects with no gender focus, 8.8% was allocated to projects where gender was the principal focus. The remaining 23.2% of funding was to projects where the gender focus was unspecified.

Figure 4. Mali – Annual per capita AFOLU climate funding to population employed in agriculture (USD). National average vs regional average (2010 – 2022)



The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our

analysis included a review of the project databases of the main providers of finance to Mali. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 57.2% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities were as follows: National Governments received approximately 38% of total funding; NGOs based in the country providing the funding received 12.12%; The World Food Programme received 8.31%. The remaining funding was largely distributed among UN agencies, international NGOs, and other public institutions. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 2. Mali – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	Germany	416.69	21.3%
2	World Bank	258.05	13.2%
3	Canada	171.59	8.8%
4	EU Institutions (excluding EIB)	152.09	7.8%
5	Netherlands	119.11	6.1%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

Germany

According to our analysis of the OECD DAC data, Germany allocated USD 416.69 million in climate funding for AFOLU activities in Mali between 2010 – 2022 (21.3% of total climate funding). All of this funding was provided as grants.

Development cooperation between Germany and Mali focuses on the following three core areas:

1. Good governance, peace, stabilisation, displacement and migration
2. Agriculture and resource conservation
3. Environment and energy

In Mali, support from Germany is mainly provided by GIZ, on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ).

To adapt agriculture to the effects of climate change and strengthen the resilience of the population, GIZ promotes environmentally friendly farming methods and innovative and agroecological value chains. To achieve this, it focuses on the resource-efficient expansion of

irrigation systems and greater profitability in production. GIZ also works to make sanitation in Mail more environmentally sound by advising local institutions on developing a circular economy and by supporting the environmentally friendly expansion of municipal electrification using climate-friendly technology.

The GIZ project database shows that it has implemented a total of 25 projects in Mai, with a total value of EUR 223.25 million. The GIZ project database lists four agriculture projects in Mali, however only one of these - 'Strengthening the national agriculture extension and training system in Mali' – is a single country project (with a budget of EUR 15.79 million). The three remaining projects are global initiatives.

World Bank

According to the World Bank finance summary for Mali, in the period 2010 – 2022, the World Bank disbursed USD 2.317 billion in funding to Mali (all of which was via the International Development Association). It is unclear however how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

A review of the World Bank project database found that between 1st January 2010 and 31st December 2022, funding was approved for 18 projects which were relevant to the AFOLU sectors, with total funding commitments of USD 1.05 billion. For the majority of projects World Bank funding was channelled via a national government ministry. It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

Notable AFOLU projects funded by the World Bank in this period include:

- **Commercial Irrigated Agriculture Development Project** - The Project Development Objective is to develop a reliable irrigation service and to enable commercially viable agriculture in the project areas. The total World Bank funding commitment was USD 100 million.
- **Agricultural Competitiveness and Diversification Project** - The project aims to foster improvements in the performances of supply chains for a range of agricultural and livestock products, for which Mali has strong comparative advantage. The proposed investment is expected to reinforce the competitiveness of both traditional (cotton, rice) and non-traditional (fruit, horticulture products, oil seeds, arabic gum, cashews, etc.) agricultural crops through targeted investment to remove critical constraints, improve productivity and efficiency and build organizational and institutional capacities, both private and public, along the supply chains. In the long term, the project should contribute to increasing and diversifying rural household incomes and economic opportunities. The total World Bank funding commitment was USD 20 million.
- **Mali Sustainable Land Management** – The objectives of the project were to: (a) recommend key elements of required policy reforms, delivery mechanisms and investments; and (b) identify priority transboundary opportunities and threats that SLM could address. The total World Bank funding commitment was USD 8.1 million.

According to our analysis of the OECD DAC data, the World Bank allocated USD 258.05 million in climate funding for AFOLU activities in Mali between 2010 – 2022 (13.2% of total climate funding). Of this funding, USD 182.68 (70.8%) million was provided as debt instruments, and the remaining USD 74.37 million (29.2%) was provided as grants.

Canada

Since 2000, Canada has provided over CAD 1.8 billion in international assistance to Mali, including CAD 119.9 million in 2021-2022. Following the August 2020 military coup, Canada suspended all Direct Budgetary Support to the Government of Mali, while maintaining humanitarian assistance, bilateral development and peace and security programming through trusted third-party partners to support the poorest and most vulnerable populations.

Canada focuses its assistance on three main areas:

1. Strengthening basic social services (health, education), including through large investments in sexual and reproductive health and rights since 2010;
2. Rural development, including building resilience against climate change and access to inclusive financial services; and
3. The consolidation of inclusive governance to restore democracy.

In line with Canada's Feminist International Assistance Policy, Canada's programming places women, adolescent girls and girls at the heart of all its interventions. Each project addresses an issue that hinders women's full participation and empowerment in a given sector of intervention. Given Mali's fragile socio-political and security context, Canada is taking a conflict-sensitive approach and working closely with various stakeholders to implement agile and integrated programming that is consistent with peace, security and humanitarian needs.

Examples of relevant projects funded by Canada in Mali include:

- Agricultural seed networks for women's empowerment (CAD 2 million)
- Food and nutrition security and climate change in the Sahel (CAD 13.5 billion)
- Inclusive finance of the agricultural sector (CAD 16 million).
- Targeted support for irrigated land and nutrition opportunities (CAD 49.5 million)

According to our analysis of the OECD DAC data, Canada allocated USD 171.59 million in climate funding for AFOLU activities in Mali between 2010 – 2022 (8.8% of total climate funding). All of this funding was provided as grants.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 186.5 million in project funding to Mali. This funding is spread across 11 projects and programmes which span multiple sectors (including several multi-country programmes which include Mali).

Our analysis found that five of these projects and programmes had relevance to the AFOLU sector, and that for this group, GCF funding allocated to Mali totalled USD 32.17 million (approximately 17.2% of the total GCF funding allocated to Mali). Across these five projects and programmes, our analysis estimates that USD 5.5 million has been disbursed to date, this is 17.1% of the estimated funding allocated to AFOLU.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF has approved USD 3.0 million in readiness funding to Mali,

across 11 readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusion

- Our analysis of the OECD DAC data indicates that funding allocated to Mali is insufficient to meet the AFOLU objectives established in its NDC. Mali's NDC identifies mitigation finance needs of USD 1 billion for the AFOLU sector, however our analysis of the OECD data indicates that in the year's 2021-2022, only USD 17.44 million in mitigation funding was allocated to AFOLU projects in Mali. The funding allocation for dual-benefit activities in the same period was USD 49.68 million. The adaptation finance needs for AFOLU in Mali's NDC are less clear, however the total adaptation finance needs across all sectors is USD 8 billion. Given the importance of agriculture to Mali's economy, it is likely that the AFOLU sector will account for a significant share of this total. In the years 2021 and 2022, total funding allocated to adaptation in the AFOLU sector was USD 469.51 million.
- The majority of funding allocated to Mali was in the form of grants (82% of total funding). The share of debt-related instruments and grants was close to 50/50 in 2020, however it remains to be seen whether this is the start of a trend or an anomaly.
- On a per capita basis, average annual funding received by farmers in Mali was consistently in line with or above the regional average. The only exception to this was in 2020, when the per capita funding to Mali dipped below the regional average.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or NGOs based in donor countries. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

MAURITANIA

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Mauritania's Nationally Determined Contribution (NDC) for the period 2021 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Mauritania's climate agenda. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture ranged between 32% and 37.8% meaning that the sector is critical to the livelihoods of a large proportion of the population (particularly those living in rural areas). Additionally, as noted in Mauritania's NDC, agriculture is currently the highest emitting sector – particularly the livestock sector, which accounts for 52.65% of total emissions. The mitigation and adaptation targets in Mauritania's NDC are summarised in table 1 below.

Table 1. Summary of AFOLU interventions and projected costs in Mauritania's Nationally Determined Contribution

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
Adaptation	Some strategies included: • Develop Farmers' insurance system and disaster funds • Development of irrigated village perimeters • Genetic improvement of local breeds • Zoning and transhumance corridors • Achieve land degradation neutrality • Sustainably manage and conserve wetlands • Stregthen ecosystem resilience	USD 1.89 billion.
Mitigation	Summary of Forestry Activities • Increase reforested and restored areas to reach the target of 3,000 ha/year and 5000 ha/year respectively in 2030 • Use biological actions from reforestation and natural regeneration from 3000 ha/year • With greater international support, reforested areas can reach the target of an additional 10,000 ha/year within the framework of the regional programs. Agricultural Activities • Organic farming: Conventional agriculture - food crops (6000 ha. Horizon 2030	USD 22.92 million

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
	• Fat supplementation ruminant feed to be in the order of 4% more fat by 2010. 2030. • Organic soil cover / Conservation agriculture: to absorb surplus nitrogen remaining after the harvest of the main crop. The application of this technique will be in the following order of 10,000 ha/year by 2030	
Total		**USD 1.9 billion**

2. Analysis of climate finance flows to Mauritania (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Mauritania during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 626.45 million was allocated to AFOLU-related activities in Mauritania. On a year-by-year basis, allocated funding has generally been on an upward trend, starting at USD 10.26 million in 2010, and reaching USD 101.04 million in 2022.

As indicated in Figure 1 (below), AFOLU funding in this period was mostly allocated in the form of grants (82.6% of total funding during the period), with the remaining 17.4% being through loans and other debt-related instruments. Less positively, as indicated in Figure 2, , debt-related instruments appear to account for a large proportion annual funding allocations in recent years, with the share reaching 69.3% of total funding allocated to AFOLU activities in 2019 and 51.6% of total funding in 2022.

Figure 1. Mauritania – Share of total AFOLU climate finance by instrument (2010 – 2022)

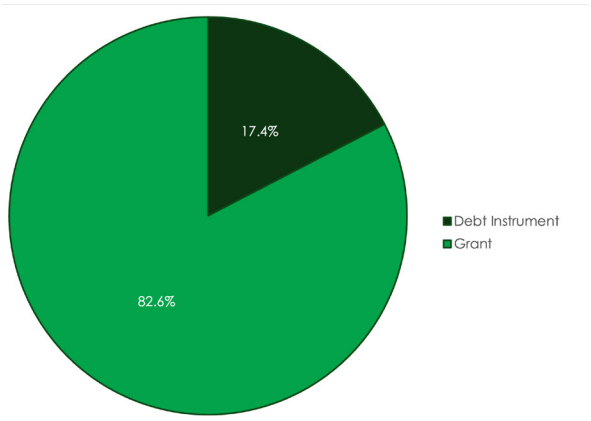
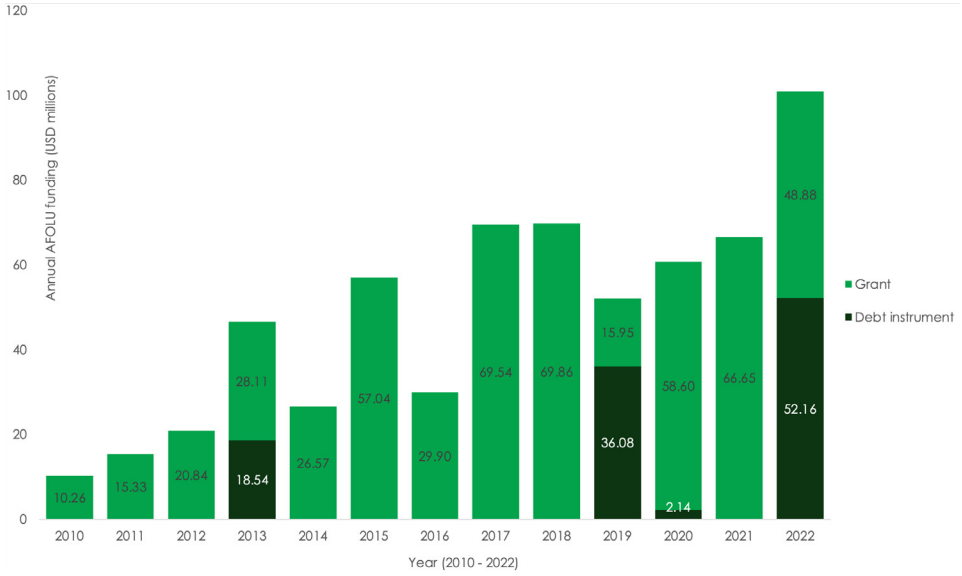
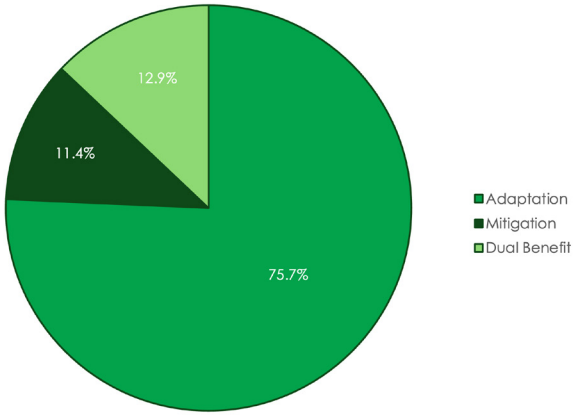


Figure 2. Mauritania – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3, most funding in this period (75.7%) was allocated to adaptation interventions. On a year-by-year basis, adaptation has accounted for at least 60% of total funding every year except for 2017 (where it was 28.3% of the total). Adaptation funding accounting for a significant share of total funding is unsurprising, given that adaptation finance needs account for 98.8% of the projected AFOLU-related finance needs in Mauritania's NDC.

Figure 3. Mauritania – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)

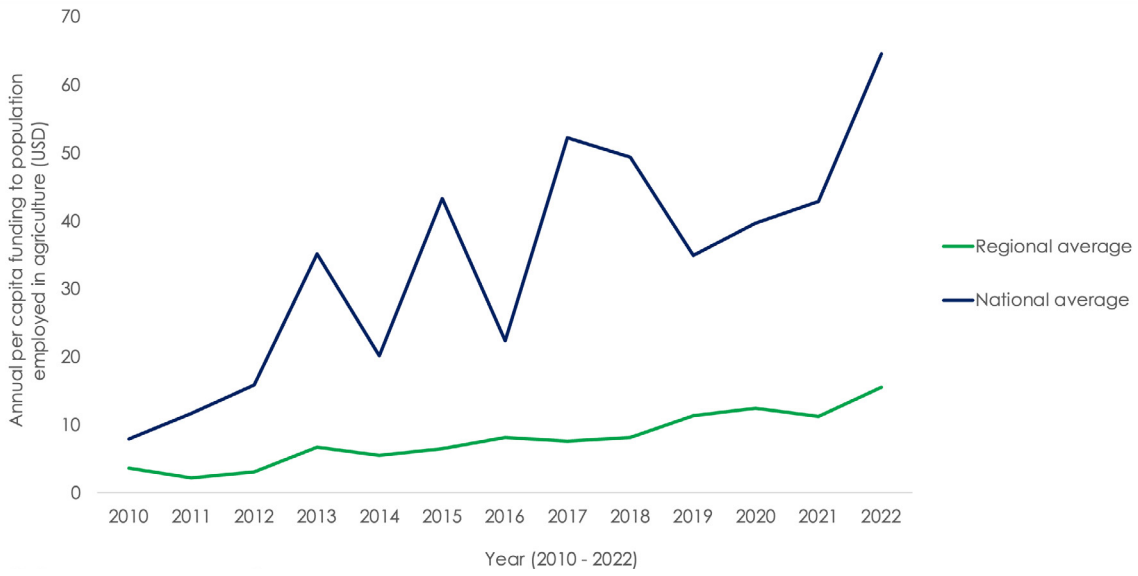


As shown on in Figure 4 (below), on a per capita basis (to the population of Mauritania that are employed in agriculture), funding is consistently above the average (for all 15 countries included in this analysis). There are only two years (2020 and 2022, where per capital funding falls below the regional average).

Between 2010-2022, 47.4% of the AFOLU-related funding allocated to Mauritania was for projects that had a significant gender focus. 5.1% was allocated for

projects where gender was the principal focus, 5.2% of funding had no gender focus, and the remaining 42% was for projects where the gender focus was not specified.

Figure 4. Mauritania – Annual per capita AFOLU climate funding to population employed in agriculture (USD). National average vs regional average (2010 – 2022)



The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our analysis included a review of the project databases of the main providers of finance to Mauritania. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 72.4% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Mauritania were as follows: National Governments received 38.85% of total funding; NGOs based in donor countries received 9.58%; 10.61% of funding went to unspecified recipients; and the remainder was largely distributed amongst multilateral agencies, international NGOs and other public institutions. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 2. Mauritania – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	World Bank	142.04	22.7%

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
2	EU Institutions	114.81	18.3%
3	Germany	107.74	17.2%
4	Global Environment Facility	46.39	7.4%
5	IsDB	42.63	6.8%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

World Bank

According to the World Bank finance summary for Mauritania, in the period 2010 – 2022, the World Bank disbursed USD 704 million in funding to Mauritania (all of which was via the International Development Association). It is unclear however how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

According to our analysis of the OECD DAC data, the World Bank allocated USD 142.04 million in climate funding for AFOLU activities in Mauritania between 2010 – 2022 (22.7% of total climate funding). Of this, USD 89.62 million (63.1%) was in grant funding , and the remaining USD 52.41 million (36.9%) was in via debt instruments.

A review of the World Bank project database found that between 1st January 2010 and 31st December 2022, a total of USD 135.41 million in grant funding was allocated to eight AFOLU-related projects in Mauritania. Examples include:

- **Mauritania Agriculture Development and Innovation Support Project** – The objective of this project is to improve land resource management and foster inclusive and sustainable commercial agriculture in selected areas of Mauritania. Total funding allocated by the World Bank was USD 50 million.
- **Mauritania Sustainable Landscape Management Project under the SAWAP** - The development objective of the Sustainable Landscape Management Project under the SAWAP for Mauritania is to strengthen sustainable landscape management (SLM) in targeted productive ecosystems in Mauritania. Total funding allocated by the World Bank was USD 4.81 million

For the majority of projects World Bank funding was channelled via a national government ministry. It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

EU Institutions

The EU supports Mauritania towards sustainable and inclusive development in line with the 'Strategy for Accelerated Growth and Shared Prosperity' - the Mauritania roadmap 2016-2030 and the Global Gateway Strategy. Sustainable food systems are one of the key pillars of EU support to Mauritania. Support in this area includes expansion of rural infrastructure and development of key agricultural value chains (including local cereals and dairy).

The EU-Mauritania partnership also promotes the blue economy in the country by contributing to the improvement of ocean and coastline governance, by protecting marine ecosystems through eco-friendly fishing,

and by strengthening fisheries value chains with the construction of land and seaport infrastructure. Key initiatives in this area include the EU-Mauritania Sustainable Fisheries Partnership Agreement.

Under the Neighbourhood, Development and International Cooperation Instrument (NDICI-Global Europe) the EU allocated EUR 125 million to the partnership with Mauritania over 2021-24. In the decade 2014-2024, the EU has been allocating to Mauritania over EUR 1 billion.

According to our analysis of the OECD DAC data, EU institutions allocated USD 114.81 million in climate funding for AFOLU activities in Mauritania between 2010 – 2022 (18.3% of total climate funding). All of this funding was allocated as grants.

Germany

According to our analysis of the OECD DAC data, Germany allocated USD 107.74 million in climate funding for AFOLU activities in Mauritania between 2010 – 2022 (17.2% of total climate funding). All of this funding was allocated as grants.

Development cooperation between Germany and Mauritania focuses on the following three core areas:

1. Peace and inclusive societies
2. Education and sustainable growth for good jobs
3. Environment and natural resources

Adaptation to climate change is a priority area. Farmland, forests and pastureland are to be managed in a climate-sensitive way, so as to ensure long-term food supplies for the population. GIZ also advises the Mauritanian Government on sustainable fishing and aquaculture that conserves natural resources.

In Mauritania, support from Germany is mainly provided by GIZ, on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ).

Examples of relevant projects in Mauritania include:

- Protection and sustainable use of fisheries resources (2023)
- Sustainable fisheries and aquaculture (2016 – 2025) – total financial commitment was EUR 76.3 million.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 61.8 million in project funding to Mauritania. This funding is spread across seven projects and programmes which span multiple sectors (including several multi-country programmes which include Mauritania).

Our analysis found that five of these projects and programmes had relevance to the AFOLU sector, and that for this group, GCF funding allocated to Mauritania totalled USD 26.5 million (approximately 42.8% of the total GCF funding allocated to Mauritania). Across these five projects and programmes, our analysis estimates that USD 3.8 million has been disbursed to date, this is 14.3% of the estimated funding allocated to AFOLU.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF has approved USD 4.0 million in readiness funding to Mauritania, across four readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusions

- Our analysis of the OECD DAC data indicates that funding allocated to Mauritania is insufficient to meet the AFOLU objectives established in its NDC. Mauritania's NDC identifies adaptation finance needs for the AFOLU sector of USD 1.89 billion, and mitigation finance needs of USD 22.92 million by 2030. It appears that whilst current funding levels are sufficient to meet mitigation finance requirements, there is a significant adaptation finance gap. For example, in the years 2020 – 2022, the average annual funding for adaptation was USD 121.24 million, this falls short of the average of USD 189 million per year that is required over the ten-year period to meet the adaptation finance requirements for AFOLU.
- The majority of funding allocated to Mauritania in the period 2010-2022 was in the form of grants (82.6% of total funding). However, in recent years, debt-related instruments have accounted for a significant share – 69.3% in 2019 and 51.6% in 2022.
- On a per capita basis, average annual funding received by farmers in Mauritania was consistently above the regional average.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or NGOs based in donor countries. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

NIGER

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Niger's Nationally Determined Contribution (NDC) for the period 2021 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Niger's climate agenda. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture was consistently above 70%, indicated that the sector is critical to the livelihoods of a large proportion of the population (particularly those living in rural areas). Niger's agriculture sector is highly vulnerable to the impacts of climate change and, as noted in Niger's Fourth National Communication to the UNFCCC (2014), the sector is the highest source of GHG emissions (accounting for 88% in 2014). The mitigation and adaptation targets in Niger's NDC are summarised in table 1 below.

Table 1. Summary of AFOLU interventions and projected costs in Niger's Nationally Determined Contribution

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
Adaptation	The measures focus on improving agriculture and livestock management through soil fertility practices, index insurance, irrigation systems, runoff water reservoirs, pest control, agroforestry, and forest restoration. They also aim to enhance livestock productivity, support traditional farming, control livestock diseases, and integrate climate adaptation strategies into development plans.	2021-2025: USD 2.72 billion 2026-2030: USD 4.02 billion
Mitigation	Plantations of multi-purpose species: 750,000; Promotion of assisted natural regeneration (ANR): 913,932 ha; Development of land for irrigated or flood crops: 424,000 ha; Living hedges and windbreaks: 145,000 km; Development and securing of pastoral enclaves, grazing areas and rest areas: 455,848 ha; Development and marking of passage corridors: 279,702 ha; Restoration of degraded pastoral land: 112,500 ha; Private forestry: 75,000 ha : Development of zero-grazing dairy farms (permanent stabling): 258 farms; Intensification of cattle fattening systems: 1,500 farms; Intensification of sheep fattening systems: 3,000 farms; "One village one wood" program:	Not specified

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
	12,500 ha; Fixation of living dunes: 10,053 ha; Rehabilitation of degraded classified forests: 10,000 ha; Input management: 10,822 tonnes; Control of deforestation (land clearing) and bush fires (firebreaks): 7,500 ha; Fodder cultivation: 2,000 ha. Implemented on an area of 4,838,899.5 -15- ha (i.e. 4% of the country's surface area), these technologies will enable Niger to sequester 4.2 tonnes of CO2-eq / ha/year.	
Total		**Greater than USD 6.74 billion**

2. Analysis of climate finance flows to Niger (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Niger during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 2.61 billion was allocated to AFOLU-related activities in Niger. On a year-by-year basis, allocated funding has generally been on an upward trend, growing from USD 3.28 million in 2010 to USD 524.21 million in 2022. Annual allocated funding for AFOLU activities has only fallen below USD 100 million once since 2013 (USD 76 million in 2015).

As indicated in Figure 1 (below), AFOLU funding in this period was mostly allocated in the form of grants (64.3% of total funding during the period), with the remaining 35.7% being through loans and other debt-related instruments. Less positively, as indicated in Figure 2, , debt-related instruments appear to account for a large proportion annual funding allocations in recent years, with the share being as high as 58.5% of annual allocated funding in 2019. In 2022, the most recent year available, debt related instruments accounted for 54.2% of total funding allocated to AFOLU related activities.

Figure 1. Niger – Share of total AFOLU climate finance by instrument (2010 – 2022)

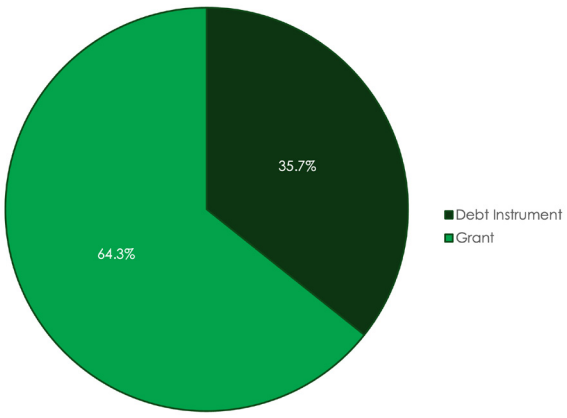
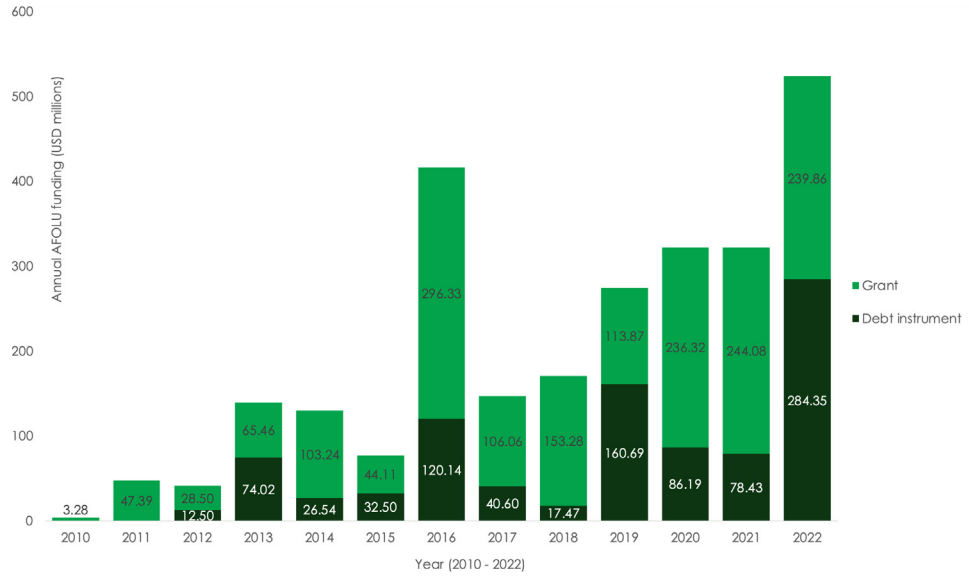
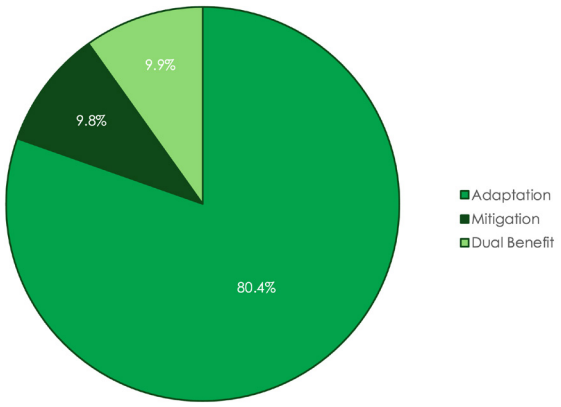


Figure 2. Niger – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3, most funding in this period (80.4%) was allocated to adaptation interventions. On a year-by-year basis, adaptation has accounted for at least 52% of total funding. In most years (besides 2014 and 2021) the share of adaptation funding has been above 73%. Adaptation funding accounting for a significant share of total funding is unsurprising, given the vulnerability of the agriculture sector to climate impacts, and that adaptation funding needs account for a substantial share of total AFOLU related funding requirements.

Figure 3. Niger – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of Niger that are employed in agriculture), funding is generally in line with or above the average (for all 15 countries included in this analysis). There are only two years (2010 and 2015) where per capital funding falls below the regional average.

Between 2010-2022, 39.9% of the AFOLU-related funding allocated to Niger was for projects that had a significant gender focus, only 1.8% was allocated for

projects where gender was the principal focus, 11.5% of funding had no gender focus, and the remaining 46.8% was for projects where the gender focus was not specified.

Figure 4. Niger – Annual per capita AFOLU climate funding to population employed in agriculture (USD). National average vs regional average (2010 – 2022)

The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our analysis included a review of the project databases of the main providers of finance to Niger. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 73.1% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Niger were as follows: National Governments received 63.65% of total funding; The World Food Programme received 7.31%; NGOs based in donor countries received 5.13%; the remainder was largely distributed amongst multilateral agencies, international NGOs and other public institutions. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 1. Niger – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	World Bank	826.22	31.6%

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
2	Germany	415.87	15.9%
3	EU Institutions	353.06	13.5%
4	African Development Bank	163.17	6.2%
5	France	154.94	5.9%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

World Bank

According to the World Bank finance summary for Niger, in the period 2010 – 2022, the World Bank disbursed USD 3.13 billion in funding to Niger (all of which was via the International Development Association). It is unclear however how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

According to our analysis of the OECD DAC data, the World Bank allocated USD 862.22 million in climate funding for AFOLU activities in Niger between 2010 – 2022 (31.6% of total climate funding). Of this, USD 583.67 million (70.6%) was via debt instruments , and the remaining USD 242.55 million (29.4%) was grants.

A review of the World Bank project database found that between 1st January 2010 and 31st December 2022, funding was approved for 26 projects with relevance to AFOLU sectors. Examples include:

For the majority of projects World Bank funding was channelled via a national government ministry. It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

- **Agriculture and Livestock Transformation Project** – World Bank commitment of more than USD 100 million. The objective of the project is to increase agriculture productivity and access to markets for small and medium farmers and agri-food small and medium enterprises in the participating project regions, and to provide immediate and effective response to an eligible crisis or emergency.
- **Niger Integrated Landscape Management Project** – The development objective of Integrated Landscape Management Project for is to increase the adoption of climate smart landscape restoration practices and improve access to income earning opportunities in targeted communes in Niger. World Bank funding commitment was USD 150 million.
- **Niger Agro-sylvo-pastoral Exports and Markets Development Project** - The project objective is to increase the value of selected products marketed by project-supported producers. World Bank funding commitment was USD 13.8 million.

Germany

According to our analysis of the OECD DAC data, Germany allocated USD 415.87 million in climate funding for AFOLU activities in Niger between 2010 – 2022 (15.9% of total climate funding). All of this funding was allocated as grants.

International cooperation between Niger and Germany began in the 1960s. GIZ has had an office in the capital, Niamey, since 1968. Following the military coup in July 2023, the German Federal Ministry for Economic Cooperation and Development suspended bilateral development cooperation with Niger. This also applies to GIZ's projects.

Prior to its suspension, bilateral development cooperation between Germany and Niger had focused on the following two areas:

1. Peace and inclusive societies
2. Living without hunger – transforming food systems.

For a life without hunger in Niger, GIZ supports the expansion and optimisation of irrigated agriculture and implementation of the national land rights policy. Its work here has a particular focus on gender sensitivity. In addition, GIZ supports education and promotes jobs for the local population.

Examples of relevant projects in Niger include:

- Supporting farmers with irrigated horticulture (2022 – 2024)
- Promoting local dairy and meat products (2023 – 2025)
- Protecting water in the Lake Chad Basin across borders (2020 – 2023)
- CATAL1.5°T Initiative: supporting investments in innovative climate start-ups in Latin America and West Africa (2022 – 2029)

EU Institutions

The EU including its Member States, is the main donor of official development assistance in Niger. Its action, in line with the revised EU Sahel Strategy, aims to strengthen State capacities, enhance security, stability and migration management, while promoting long-term sustainable and inclusive development, with a special focus on fragile and transit areas. The EU Delegation in Niger also contributes to the continental Flagship of the Great Green Wall through several project on soils restoration.

Building on the experience and priorities of the previous programming cycle, a new Multiannual Indicative Programme (MIP) for the period 2021-2027 was adopted in 2021, with an initial allocation of EUR 503 million for the period 2021-2024. This amount is being allocated through programmes focusing on 3 priority areas:

- Governance
- Education and vocational training
- Growth and the green economy

According to our analysis of the OECD DAC data, EU institutions allocated USD 353.06 million in climate funding for AFOLU activities in Niger between 2010 – 2022 (13.5% of total climate funding). All of this funding was allocated as grants.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 115.1 million in project funding to Niger. This funding is spread across ten projects and programmes which span multiple sectors (including several multi-country programmes which include Niger).

Our analysis found that six of these projects and programmes had relevance to the AFOLU sector, and that for this group, GCF funding allocated to Niger totalled USD 72.3 million (approximately 62.8% of the total GCF funding allocated to Niger). Across these five projects and programmes, our analysis estimates that USD 7.6 million has been disbursed to date, this is 10.5% of the estimated funding allocated to AFOLU.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for

multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF has approved USD 4.8 million in readiness funding to Niger, across eight readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusions

- Our analysis of the OECD DAC data indicates that funding allocated for adaptation initiatives in Niger is currently below the levels required to meet the adaptation finance needs for AFOLU outlined in Niger's NDC. In the years 2020 – 2022, our analysis of the OECD data indicates that average annual funding allocations to adaptation initiatives in the AFOLU sectors were USD 272.41 million. This is approximately 50% of the average annual projected funding allocations required between 2021 and 2025 (total funding requirements for AFOLU in this period are USD 2.72 billion). Funding allocations will need to be scaled even more significantly after 2025, as the projected needs for 2026-2030 are USD 4.02 billion (an average of USD 800 million per year).
- The majority of funding allocated to Niger in the period 2010-2022 was in the form of grants (64.3% of total funding). However, in recent years, debt-related instruments have increasingly accounted for a significant share – including more than 50% of the annual total in two out of the most recent four years (2019 and 2022). Whilst Niger is not currently considered as in or at risk of debt distress by the IMF, the country has had its credit rating downgraded since 2020[1]. There is thus a concern about the affordability of climate finance in the form of debt for Niger going forward.
- On a per capita basis, average annual funding received by farmers in Niger has generally been in line with or above the regional average. The only exceptions were in 2010 and 2015, where annual per capita funding in Niger was marginally below the regional average.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or NGOs based in donor countries. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

1 Climate Policy Initiative (October 2024), Landscape of Climate Finance in Africa 2024

NIGERIA

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Nigeria's Nationally Determined Contribution (NDC) for the period 2021 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Nigeria's climate agenda. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture was consistently above 70%, indicated that the sector is critical to the livelihoods of a large proportion of the population (particularly those living in rural areas).

Nigeria's agriculture sector is important from both an adaptation and mitigation perspective. The sector is highly vulnerable to the impacts of climate change and, as noted in Nigeria's NDC, the AFOLU sector is the second largest contributor to total GHG emissions, contributing approximately 25% of national total GHG emissions in 2018. The mitigation and adaptation targets in Nigeria's NDC are summarised in table 1 below.

Table 1. Summary of AFOLU interventions and projected costs in Nigeria's Nationally Determined Contribution

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
Adaptation		Not specified
Mitigation	AFOLU Mitigation Objectives mainy focus on objectives in the forestry sector. • Enhancemnet of REDD+ activities • Plant 12 million trees • Protection and restoration of mangrove forest ecosystems (13,012 ha), restoring of degraded forest areas (115,584 ha), protection of forests (46,219ha), • Address energy gaps and include capacity building of local communities in improving forest management (128,528 ha), promoting good governance, ensuring equitable access and distribution of forest resources to all affected parties, including women, youths and other vulnerable groups and accessing finance to realise these objective through partnerships	Not specified
Total		**Not specified**

2. Analysis of climate finance flows to Nigeria (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Nigeria during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 3.09 billion was allocated to AFOLU-related activities in Nigeria. On a year-by-year basis, allocated funding has generally been on an upward trend, growing from USD 1.3 million in 2010 to USD 759.3 million in 2022. Annual allocated funding for AFOLU activities has been above USD 400 million four out of five years in the period 2018-2022 (funding was USD 65.61 million in 2019).

On a less positive note, between 2010 – 2022, the majority of climate finance (83.5%) allocated for AFOLU activities in Nigeria has been in the form of debt related instruments.

Figure 1. Nigeria – Share of total AFOLU climate finance by instrument (2010 – 2022)

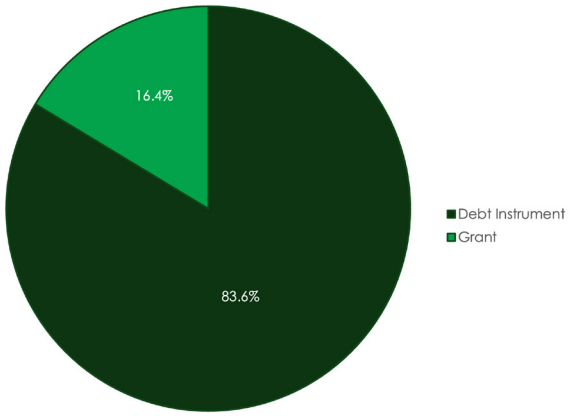
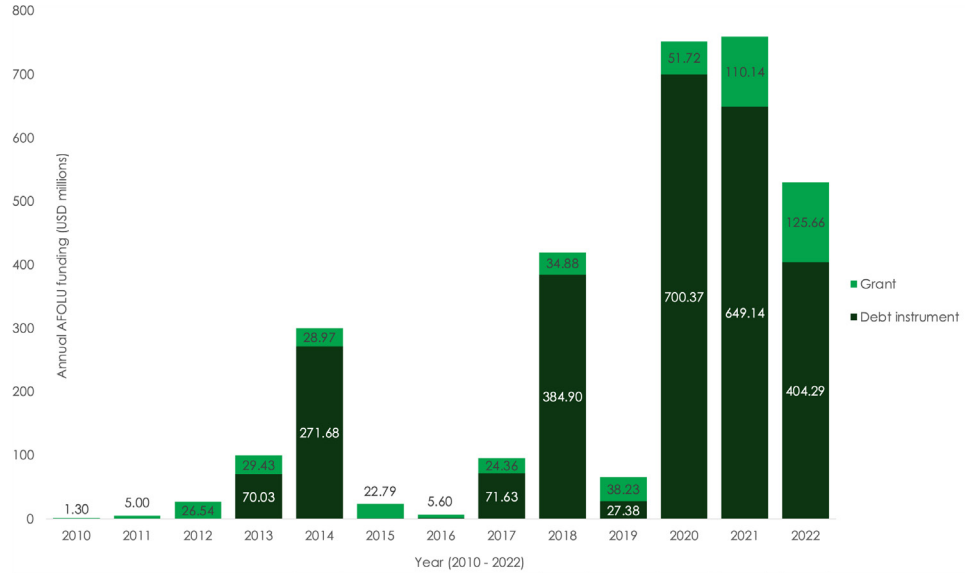
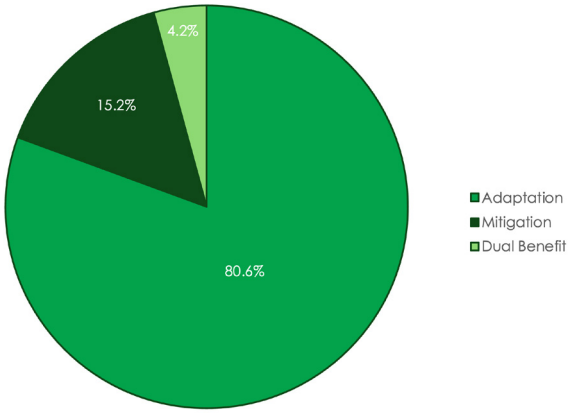


Figure 2. Nigeria – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3, most funding in this period (80.6%) was allocated to adaptation interventions. On a year-by-year basis, adaptation has accounted for more than 77% of annual allocated funding in every year except for 2022. Adaptation funding accounting for a significant share of total funding is unsurprising, given the vulnerability of the agriculture sector to climate impacts.

Figure 3. Nigeria – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of Nigeria that are employed in agriculture), funding has been significantly below the regional average (for all 15 countries included in this analysis) in every year under review. This, combined with the fact that the majority of AFOLU related funding is received as debt, would indicate that farmers and MSMEs in Nigeria do not have sufficient access to affordable climate funding.

Between 2010-2022, 18.2% of the AFOLU-related funding allocated to Nigeria was for projects that had a significant gender focus, only 1% was allocated for projects where gender was the principal focus, 3.5% of funding had no gender focus, and the remaining 77.2% was for projects where the gender focus was not specified.

Figure 4. Nigeria – Annual per capita AFOLU climate funding to population employed in agriculture (USD). National average vs regional average (2010 – 2022)

The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our analysis included a review of the project databases of the main providers of finance to Nigeria. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 85.6% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Nigeria were as follows: National Governments received 73.64% of total funding; 13.39% of funding went to recipients that were not specified; NGOs based in donor countries received 5.13%; the remainder was largely distributed amongst multilateral agencies, international NGOs and other public institutions. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 1. Nigeria – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	World Bank	1,870.20	60.6%
2	France	229.89	7.5%
3	European Investment Bank	199.87	6.5%
4	IFAD	175.12	5.7%
5	United States of America	164.85	5.3%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

World Bank

According to the World Bank finance summary for Nigeria, in the period 2010 – 2022, the World Bank disbursed USD 11.81 billion in funding to Nigeria. Of this funding USD 11.487 billion was provided by the International Development Association, and the remaining USD 324 million was from the International Bank for Reconstruction and Development (IBRD). It is unclear how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

According to our analysis of the OECD DAC data, the World Bank allocated USD 1.87 billion in climate funding for AFOLU activities in Nigeria between 2010 – 2022 (60.6% of total climate funding). All of this funding was in the form of debt instruments.

A review of the World Bank project database found that between 1st

January 2010 and 31st December 2022, funding was approved for 25 projects with a focus on AFOLU activities. Representative examples include:

- **Agro-Climatic Resilience in Semi-Arid Landscapes (ACReSAL)** - The development objective of the Agro-Climatic Resilience in Semi-Arid Landscapes (ACReSAL) Project for Nigeria is to increase the implementation of sustainable landscape management practices in targeted watersheds in northern Nigeria and strengthen Nigeria's long-term enabling environment for integrated climate-resilient landscape management. Total World Bank funding allocated to this project was USD 700 million.
- **Livestock Productivity and Resilience Support Project** – Objective of this project is to improve productivity, commercialization, and resilience of targeted livestock production systems in Nigeria. Total World Bank funding allocated was USD 500 million.
- **Transforming Irrigation Management in Nigeria** – The objective of this project is to improve access to irrigation and drainage services and to strengthen institutional arrangements for integrated water resources management and agriculture service delivery in selected large-scale public schemes in Northern Nigeria. Total project funding allocated by the World Bank was USD 495.3 million.
- **Nigeria Scaling Up Sustainable Land Management Practice, Knowledge, and Coordination** – Total funding allocated by the World Bank was USD 6.8 million.

For the majority of projects World Bank funding was channelled via a national government ministry. It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

France

According to our analysis of the OECD DAC data, France allocated USD 229.89 million in climate funding for AFOLU activities in Nigeria between 2010 – 2022 (7.5% of total climate funding). Of this, USD 227.9 million (99.1%) was via debt instruments , and the remaining USD 1.97 million (0.9%) was grants.

The website of the French Development Agency (Agence Française de Développement) notes that since AFD began activities in Nigeria EUR 2 billion of financial commitments have been made, and 35 projects have been finance across all sectors. Support by AFD in the AFOLU sector includes allocating funding to the following four projects:

- Promote Sustainable Agriculture in West African Countries
- Reduce Food and Nutrition Insecurity in West Africa
- Eradicate Destricutive Insects in the Horticultural Sector
- Build Capacity to Respond to Food Crises

Total funding allocated to these four projects was EUR 64.6 million, with all of this funding allocated as grants.

European Investment Bank

According to our analysis of the OECD DAC data, the European Investment Bank allocated USD 199.87 million in climate funding for AFOLU activities in Nigeria between 2010 – 2022 (6.5% of total climate funding). All of the funding allocated was as debt instruments.

According to the European Investment Bank project database, the EIB has provided funding of EUR 2.2 billion to Nigeria between 1959 – 2024. This funding has been spread across 46 transactions. EUR 40.5 million has been allocated to projects in the agriculture, forestry and

fisheries sectors. This was for a project titled 'Nigeria Access to Agri Markets Framework Loan' (in 2023).

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 193.9 million in project funding to Nigeria. This funding is spread across 15 multi-country programmes which span multiple sectors.

Our analysis found that seven of these programmes had relevance to the AFOLU sector, and that for this group, GCF funding allocated to Nigeria totalled USD 49.9 million (approximately 25.7% of the total GCF funding allocated to Nigeria). Across these five projects and programmes, our analysis estimates that USD 16.4 million has been disbursed to date, this is 32.8% of the estimated funding allocated to AFOLU.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF has approved USD 4.9 million in readiness funding to Nigeria, across six readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusions

- Our analysis of the OECD data shows that in the most recent three years (2020-2022), funding allocated to AFOLU related initiatives in Nigeria has been above USD 500 million. Nigeria's NDC does not provide details of finance needs for the AFOLU sector, so it is unclear whether current funding levels are sufficient or not.
- The majority of funding allocated to Nigeria in the period 2010-2022 was in the form of debt-related instruments (83.6% of total funding). Whilst Nigeria is not currently considered as in or at risk of debt distress by the IMF, the country has had its credit rating downgraded since 2020[1]. There is thus a concern about the affordability of climate finance in the form of debt for Nigeria going forward.
- On a per capita basis, average annual funding received by farmers in Nigeria has consistently been below the regional average in every year during the period 2010 – 2022.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or NGOs based in donor countries. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

1 Climate Policy Initiative (October 2024), Landscape of Climate Finance in Africa 2024

SENEGAL

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Senegal's Nationally Determined Contribution (NDC) was published in 2020 and sets targets for both 2025 and 2030. AFOLU is a priority sector within Senegal's climate agenda. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture ranged from 37.9% in 2010 to 21.5% in 2022. Whilst overall share of the population employed in agriculture is falling, the sector remains a key source of employment. Additionally, as noted in Senegal's NDC, it is currently the highest emitting sector (accounting for 48% of emissions in 2005) and is highly vulnerable to the effects of climate change. Senegal's NDC sets targets for both adaptation and mitigation in the agriculture and forestry sectors, a summary of these as well as projected finance needs, are shown in table 1. Total projected costs for AFOLU are USD 2.48 billion by 2030.

Senegal developed a National Adaptation Programme of Action (NAPA) in 2006. Sectoral NAPs are currently being developed but are not yet publicly available (UNDP, 2024).

Table 1. Summary of AFOLU interventions and projected costs in Senegal's Nationally Determined Contribution

Development Sector	Objectives	Funding needs FCFA (billions) and USD (millions)
Agriculture	Mitigation objectives include: • Reducing GHG emissions from the agriculture sector by between 2.36% (unconditional target) and 11.98% (conditional target) by 2030. Adaptation actions in agriculture and breeding focus on early warning systems, sustainable land management, and diversification of production systems. Key measures include the adoption of climate-resilient varieties, genetic improvement, improved water management through local irrigation practices, and climate information services. Additionally, insurance mechanisms and post-harvest management strategies aim to enhance resilience and reduce losses.	Mitigation funding needs are USD 726.7 million. Adaptation finance needs are USD 1.08 billion.
Environment, forestry and biodiversity	Increase annual reforested/restored areas by around 1,297 ha of mangroves and 21,000 ha of various plantations.	Mitigation funding needs are USD 454.8 million.

Development Sector	Objectives	Funding needs FCFA (billions) and USD (millions)
	• Defend 500,000 ha of forest • Reforest and restore 4,000 ha/year of mangroves • Plant 500,000 ha of various crops • Reduce the area burnt by bush fires by 90% by the fifth year of implementation of management plans. These efforts will reduce the rate of deforestation by 25%, from 40,000 ha/year, in 2010 to 30,000 ha/year in 2030.	Adaptation finance needs are USD 217.5 million.
Total		**USD 2.48 billion**

2. Analysis of climate finance flows to Senegal (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Senegal during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 2.12 billion was allocated to AFOLU-related activities in Senegal. On a year-by-year basis, the highest amount of annual funding allocated to AFOLU activities in Senegal was in 2015 (USD 291.67 million), approximately USD 122 million of this allocated funding was to two projects. Besides this, annual funding has broadly been on an upward trajectory. The lowest annual total was USD 42.48 million in 2011, growing to USD 247.62 million in 2022 (the most recent available year for which data is available).

As indicated in Figure 1 (below), AFOLU funding in this period was mostly allocated in the form of debt instruments (55.1%), with the remaining 44.9% being through grants. As indicated in Figure 2, on a year-by-year, debt instruments have been the most significant share of funding in most years (with the exceptions being 2010, 2011, 2016, 2017, and 2019). Debt instruments as a share of total funding appear to be growing particularly significant as of 2018.

Figure 1. Senegal – Share of total AFOLU climate finance by instrument (2010 – 2022)

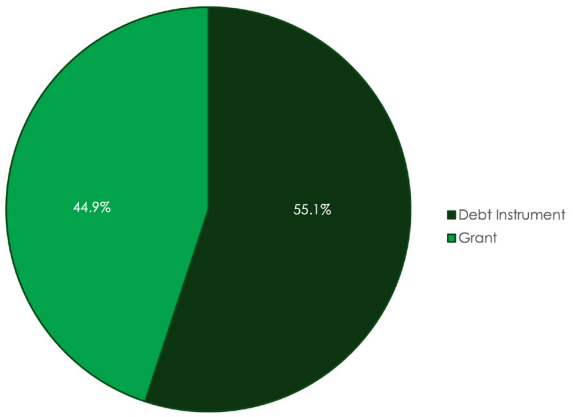
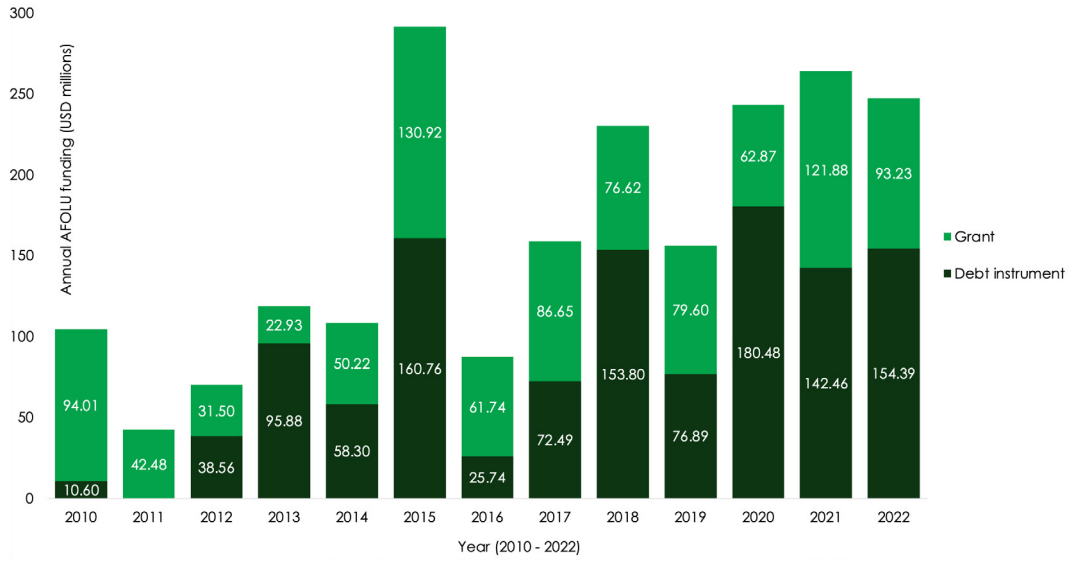


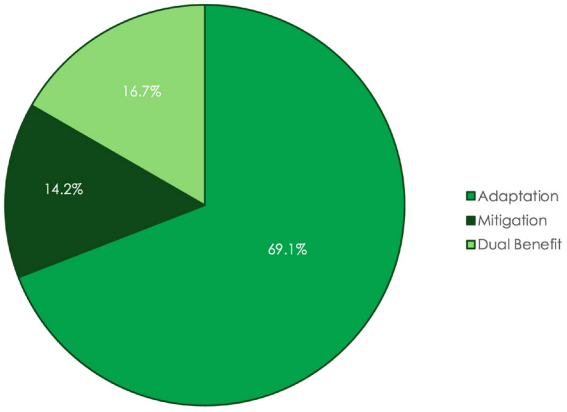
Figure 2. Senegal – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3, most funding in this period (69.1%) was allocated to adaptation interventions. This is unsurprising, given that the adaptation objectives set out in Senegal's NDC account for above 50% of total climate finance needs for the AFOLU sector.

Total adaptation funding captured by the OECD DAC data was USD 1.47 billion in this period. In the years where OECD DAC data overlaps with the NDC target period (2020 – 2022) the annual average funding allocated to adaptation initiatives was USD 165.54. If the annual adaptation funding needs for implementation of Senegal's NDC are equally distributed across the 10-year period, annual funding needs would be approximately USD 130 million per year. Based on this, Senegal's adaptation funding needs for the AFOLU sector (as indicated in the NDC) are on track to be met (as long as current annual funding allocations are maintained). Greater clarity is required however, on how much of the allocated funding is being disbursed, and to what extent this funding is aligned with the NDC objectives. This will be analysed in greater detail in section 3 of this brief.

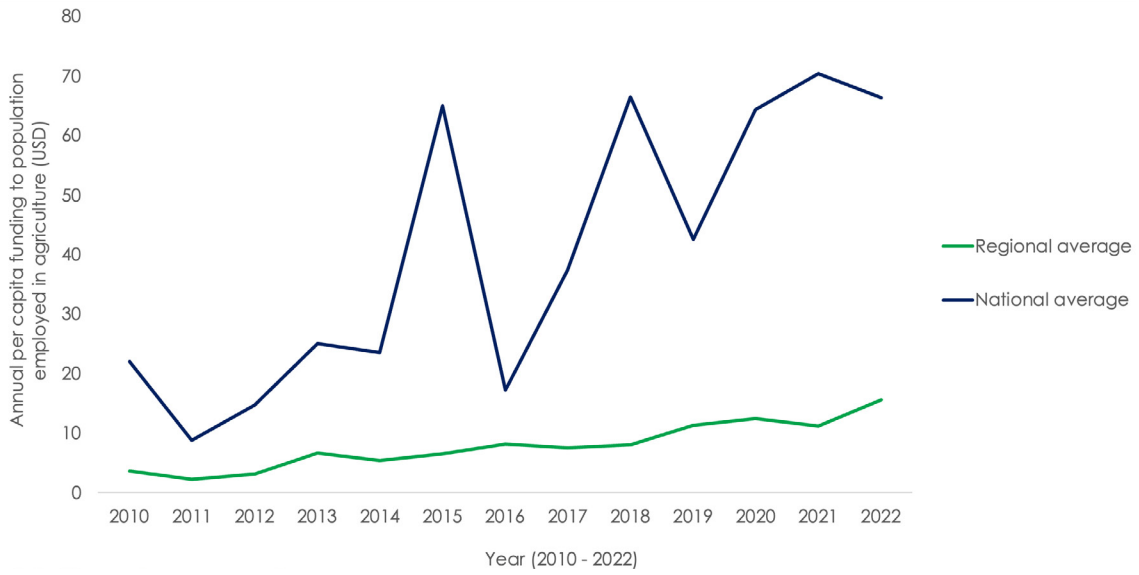
Figure 3. Senegal – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of Senegal that are employed in agriculture), funding is consistently above the regional average (for all 15 countries included in this study). The regional average per capita funding (for all countries excluding Senegal) over a 13 year period is USD 7.39 per agricultural worker per year. For agricultural workers in Senegal, the average annual per capita funding is USD 40.32, this more than five times the average in the rest of the region.

Between 2010-2022, 47.2% of the AFOLU-related funding allocated to Senegal was for projects that had a significant gender focus. 14.9% was allocated for projects with no gender focus, just 1.8% was allocated to projects where gender was the principal focus. The remaining 36.2% of funding was to projects where the gender focus was unspecified.

Figure 4. Senegal – Annual per capita AFOLU climate funding to population employed in agriculture (USD). National average vs regional average (2010 – 2022)



The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our analysis included a review of the project databases of the main providers of finance to Senegal. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 64.5% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities were as follows: National Governments received 63.61% of total funding; NGOs based in the country providing the funding received 7.77%; 8.85% of funding was marked as either other or unspecified. It appears based on this that very little funding is being

channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 2. Senegal – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	France	465.17	21.9%
2	World Bank	328.41	15.5%
3	EU Institutions (excluding the EIB)	214.50	10.1%
4	African Development Bank	203.86	9.6%
5	United States of America	156.76	7.4%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

France

According to our analysis of the OECD DAC data, France allocated USD 465.16 million in climate funding for AFOLU activities in Senegal between 2010 – 2022 (21.9% of total climate funding). Of this total, USD 341.35 million (73.4%) was provided as debt instruments, and USD 123.82 million (26.6%) was provided as grants.

According to the French Ministry of Europe and Foreign Affairs, Senegal is one of the priority countries in France's development policy. In 2021, Senegal was the largest recipient of ODA from France, receiving a total of EUR 177 million.

The website of the French Development Agency (Agence Française de Développement) notes that since 2012, EUR 2.2 billion has been committed to developmental initiatives in Senegal and 115 projects have been financed.

AFD has developed it's AGREENFI program to support the mobilization of financial institutions in developing countries to promote sustainable and climate change-resilient agriculture, improve the living conditions of rural communities and facilitate the structuring of rural areas. With AGREENFI, AFD Group offers adapted financial services and customized technical support to rural stakeholders. In Senegal, AFD's AGREENFIN program is supporting the National Agricultural Credit Fund of Senegal (CNCAS) to facilitate the financing of investments necessary for the development of modern agriculture. To date, funding for this project has totalled EUR 15.3 million.

World Bank

According to the World Bank finance summary for Senegal, in the period 2010 – 2022, the World Bank disbursed USD 3.197 billion in funding to Senegal (all of which was via the International Development Association). It is unclear how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

According to our analysis of the OECD DAC data, the World Bank allocated USD 328.41 million in climate funding for

AFOLU activities in Senegal between 2010 – 2022 (15.5% of total climate funding). Of this total, USD 318.85 million (97.1%) was provided as debt instruments, and USD 9.56 million (2.9%) was provided as grants.

A review of the World Bank project database found that between 1st January 2010 and 31st December 2022, funding was approved for 76 projects (across all sectors). A total of 648.39 million was committed to 11 AFOLU projects. In all cases the funding was channelled via a national government ministry. It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries. Examples of projects includes:

- **Senegal Natural Resources Management Project** - The objective of the Project is to improve the management of fish and forest resources and access to related economic opportunities in target areas. The World Bank has committed USD 100 million to this project.
- **Community-based Sustainable Land Management Project (2014-2021)**– World Bank commitment was USD 6.02 million.
- **Casamance Economic Development Project** - The development objective of the project is to build inclusive local governance systems that deliver climate resilient local services and infrastructure, in targeted communities in Casamance. World Bank commitment was USD 45 million.

EU Institutions

According to our analysis of the OECD DAC data, the EU institutions allocated USD 214.5 million in climate funding for AFOLU activities in Senegal between 2010 – 2022 (10.1% of total funding). All this funding was provided as grants.

The EU's support to Senegal covers multiple sectors, which overall form the Green Economy in Senegal initiative. Agriculture and environment is one of these areas. Support to Senegal within this area includes helping the country to achieve food security and sovereignty and become an important regional player in the agro-industry sector. The EU supports the agro-ecological transition and the industrialisation of agriculture, while paying attention to the creation of decent jobs and environmental protection. Team Europe support focuses on:

- **Value chains:** transforming, with industrial ambitions, selected strategic value chains such as peanuts, cereals, onions and bananas into means for creating jobs, increasing food security and local consumption while expanding export opportunities;
- **Access to credit** for very small, small and medium-sized agriculture enterprises and cooperatives;
- **Management of protected areas,** especially in the coastal regions;
- **Regreening the country:** strengthening and expanding the Great Green Wall;
- **Sanitation:** depolluting the Hann Bay in Dakar to offer better living conditions to urban population as well as to restore the marine ecosystem of the bay.

The Fourth Biennial Update Report from the European Union (2022), notes that the EU Institutions have provided funding to the following AFOLU related initiatives in Senegal:

- Cooperation program between Senegal and the European Union for food security and social protection. Funding provided by the EU was USD 14.17 million grant funding.
- Climate change and integrated management of coastal areas of Senegal (AMCC+). Funding provided

by the EU was USD 5.9 million grant funding.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 218.1 million in project funding to Senegal. This funding is spread across 15 projects and programmes which span multiple sectors (including several multi-country programmes which include Senegal).

Our analysis found that ten of these projects and programmes had relevance to the AFOLU sector, and that for this group, GCF funding allocated to Senegal totalled USD 103.71 million (approximately 47.5% of the total GCF funding allocated to Senegal). Across these ten projects and programmes, our analysis estimates that USD 24.64 million has been disbursed to date, this is 23.8% of the estimated funding allocated to AFOLU.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF had allocated USD 6.1 million in readiness funding to Senegal across 12 readiness activities, however it is unclear how much of this funding has been disbursed, and how much is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusions

- Our analysis of climate-related development finance allocated to AFOLU activities in Senegal found that year-on-year, after peaking in 2015, funding allocations have broadly been on an upward trend between 2016 and 2022.
- Climate finance requirements for the AFOLU objectives set out in Senegal's NDC are approximately USD 2.48 billion by 2030 (an average of approximately USD 250 million per year over the 10-year period). Based on our analysis of the OECD DAC database, the current annual total allocations for AFOLU projects in Senegal are almost in line with the annual funding needs of the country. Between 2020 – 2022, the average annual funding allocated to AFOLU projects in Senegal was USD 251.77. Assuming funding keeps being allocated at similar levels, project funding is aligned with NDC objectives, and all funding is disbursed, Senegal is on track to fund its NDC targets.
- More concerningly, between 2010 – 2022, the majority of AFOLU-related climate finance (55.1%) was allocated as debt related instruments. Whilst Senegal is not currently considered as in or at risk of debt distress by the IMF, the country has had its credit rating downgraded since 2020[1]. There is thus a concern about the affordability of climate finance in the form of debt for Senegal going forward.

1 Climate Policy Initiative (October 2024), Landscape of Climate Finance in Africa 2024

- On a per capita basis, average annual funding received by Senegalese farmers was consistently significantly above the regional average. Between 2010 – 2022, the average annual per capita funding received Senegalese farmers was USD 40.32. The regional average (for 14 countries, when Senegal was excluded) was USD 7.39 per agricultural worker. This means that on a per capita basis, five times more funding was allocated to Senegalese farmers than the regional average.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or NGOs based in donor countries. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

SOMALIA

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Somalia's Nationally Determined Contribution (NDC) for the period 2021 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Somalia's climate agenda. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture was consistently between 25% – 35%. This indicates that the sector is critical to the livelihoods of a large proportion of the population (particularly those living in rural areas). A summary adaptation and mitigation objectives and finance needs for the AFOLU sector presented in Somalia's NDC are summarised below.

Table 1. Summary of AFOLU interventions and projected costs in Somalia's Nationally Determined Contribution

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
Adaptation	The Adaptation actions in Somalia primarily focus on enhancing agricultural resilience by improving crop and livestock productivity through drought-resistant crops, irrigation systems, agroforestry, and sustainable rangeland management. Key components include better water management, veterinary services, value addition, and the integration of traditional knowledge, while empowering women and youth in environmental conservation and climate adaptation.	Estimated investment required (2021-2030): • Agriculture and Food security: USD 10 billion. • Forestry and Environment: USD 300 million.
Mitigation	Agriculture: • Implement Agroforestry practices • Rangeland restoration and rehabilitation • Implement Sustainable Land management including climate smart agriculture practices Forestry • Afforestation and Reforestation of Degraded Forests including mangroves restoration • Promote programmes aimed at reducing emissions from deforestation and forest degradation including through REDD+ readiness activities and implementing charcoal policy	Estimated investment required (2021-2030): • Agriculture USD 600 million. • Forestry: USD 3,850 million.
Total		**Approx. USD 14.75 billion**

2. Analysis of climate finance flows to Somalia (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Somalia during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 704.20 million was allocated to AFOLU-related activities in Somalia. On a year-by-year basis, allocated funding has generally been on an upward trend, growing from USD 0.41 million in 2010 to USD 194.9 million in 2022. In the period which aligns with Somalia's NDC implementation timeframe (2021 and 2022), the average annual funding allocated for AFOLU activities was on average USD 136.1 million per year. When compared with the overall funding needs, which average to almost USD 1.5 billion per year, this figure falls woefully short (under 10% of the average annual climate finance needs required for implementation of the NDC objectives).

On a more positive note – as shown in Figure 1 - all of the climate finance allocated to AFOLU activities in the period 2010 – 2022, was provided as grant funding.

Figure 1. Somalia – Share of total AFOLU climate finance by instrument (2010 – 2022)

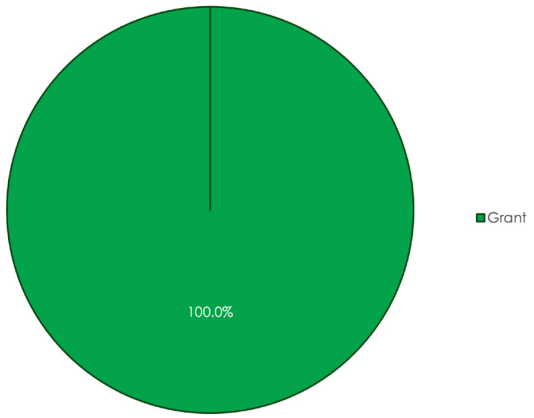
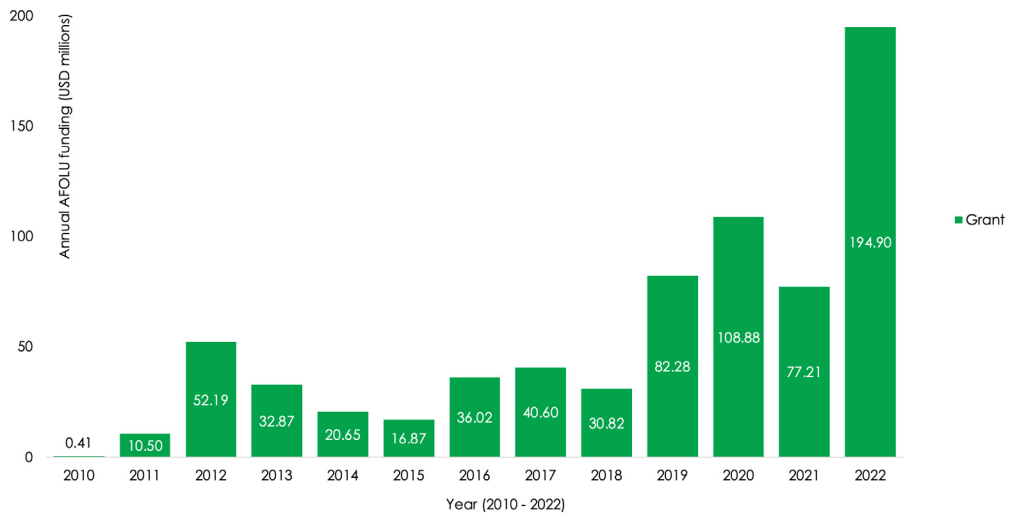
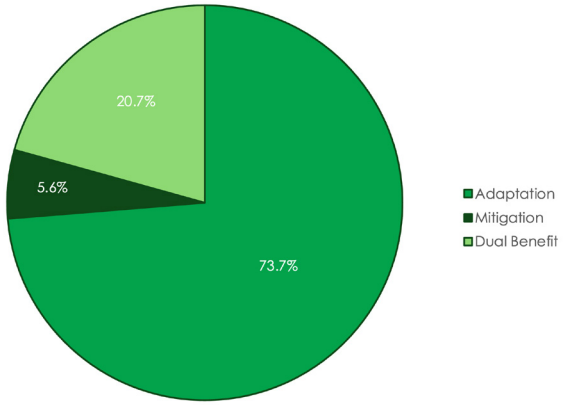


Figure 2. Somalia – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3, most funding in this period (73.7%) was allocated to adaptation interventions. On a year-by-year basis, adaptation has accounted for more than 65% of annual allocated funding in all but three years (2011, 2012, and 2016). Adaptation funding accounting for a significant share of total funding is unsurprising, given the vulnerability of the agriculture sector to climate impacts.

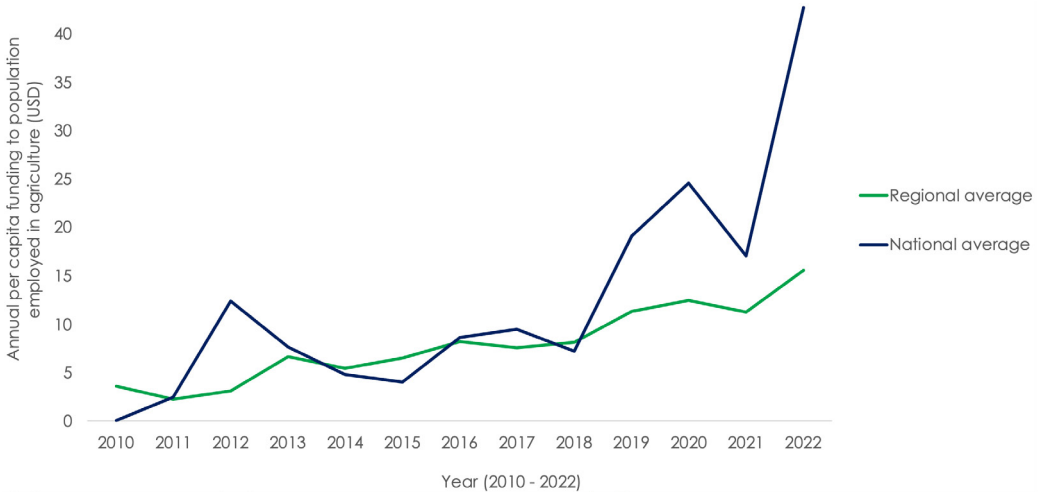
Figure 3. Somalia – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of Somalia that are employed in agriculture), funding has generally been in line with or above the regional average (for all 15 countries included in this analysis). This has been the case in every year besides 2015, where per capital dipped slightly below the regional average.

Between 2010-2022, 40% of the AFOLU-related funding allocated to Somalia was for projects that had a significant gender focus, 4.8% was allocated for projects where gender was the principal focus, 16.4% of funding had no gender focus, and the remaining 38.8% was for projects where the gender focus was not specified.

Figure 4. Somalia – Annual per capita AFOLU climate funding to population employed in agriculture (USD). National average vs regional average (2010 – 2022)



The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our analysis included a review of the project databases of the main providers of finance to Somalia. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 73.2% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Somalia were as follows: National Governments received 31.24% of total funding; The UN Food and Agriculture Organisation received 11.5%; NGOs based in donor countries received 11.44%; the remainder was largely distributed amongst multilateral agencies, international NGOs and other public institutions. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 1. Somalia – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	World Bank	191.37	27.2%
2	Germany	149.85	21.3%
3	EU Institutions (excluding the EIB)	88.06	12.5%
4	Global Environment Facility	50.02	7.1%
5	Sweden	35.99	5.1%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

World Bank

According to the World Bank finance summary for Somalia, in the period 2010 – 2022, the World Bank disbursed USD 504 million in funding to Somalia (all of which was via the International Development Association). It is unclear however how much of this is climate-finance and what proportion of this funding was for AFOLU related projects. The search data for Somalia also shows that disbursements were only made in the 2019, 2020, and 2022 financial years. This is because the World Bank had not provided any direct financial support to the government of Somalia between 1991 and 20181.

According to our analysis of the OECD DAC data, the World Bank allocated USD 191.37 million in climate funding for AFOLU activities in Somalia between 2010 – 2022

(27.2% of total climate funding). All of this funding was grants.

A review of the World Bank project database found that between 1st January 2010 and 31st December 2022, funding was approved for 7 projects with relevance to the AFOLU sectors. Total approved funding in this period was USD 287.64 million. Examples of World Bank funded projects in Somalia include:

- **Somalia - Water for Agro-pastoral Productivity and Resilience** - The objective of this project is to develop water and agricultural services among agro-pastoralist communities in dryland areas of Somalia. The World Bank allocated USD 42 million in grant funding for this project.
- **Drought Management and Livelihood Protection** - The objective of this project is to provide targeted emergency support to drought affected populations in Somalia including cash for work to preserve the livelihoods and the distribution of agricultural inputs, livestock feed or veterinary services in order to support the recovery of agriculture and livestock productive capacity. World Bank allocated USD 9 million in grant funding.

For the majority of projects World Bank funding was channelled via a national government ministry. It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

Germany

According to our analysis of the OECD DAC data, Germany allocated USD 149.85 million in climate funding for AFOLU activities in Somalia between 2010 – 2022 (21.3% of total climate funding). All of this funding was as grants.

International cooperation between Niger and Germany began in 1964. Projects and programmes are managed from GIZ's office in Kenya. German development cooperation in Somalia focuses on the following three areas:

1. Agriculture, rural development and water resource management
2. Resilience building to address the root causes of migration.
3. Economic development and Technical Vocational Education and Training (TVET)

Examples of AFOLU projects that the German government has supported in Somalia include:

- Support for agricultural production and quality assurance (EUR 13.1 million)
- Strengthening IGAD's capacity to increase resilience in the Horn of Africa – Phase III (contribution from Germany unknown)

EU Institutions

According to our analysis of the OECD DAC data, the EU Institutions allocated USD 88.06 million in climate funding for AFOLU activities in Somalia between 2010 – 2022 (12.5% of total climate funding). All of this funding was as grants.

The EU website notes that since 2014, the EU and its member states have provided EUR 3.5 billion to Somalia. In October 2023, the EU announced a EUR 89.5 million Multi-annual Action Plan with Somalia.

EU support to Somalia focuses on the following three priority areas:

- Governance and peacebuilding;
- Inclusive and green economic growth; and
- Resilience building and social inclusion

These initiatives cover the development of sustainable agri-food systems and supporting dialogue with the private sector. One one initiative noted in this area is the EU-Somali Investment Trade &

Business Platform (ITBP), which is a tool for trade collaboration.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 78.4 million in project funding to Somalia. This funding is spread across four multi-country programmes which span multiple sectors.

Our analysis found that one of these programmes – FP239. Building Climate Resilience for Food and Livelihoods in the Horn of Africa (BREFOL) - has relevance to the AFOLU sector, and that for this programme, GCF funding allocated to Somalia totalled USD 30.2 million (approximately 38.5% of the total GCF funding allocated to Somalia). FP239 was only approved by the GCF board in July 2024 and, to date, no disbursements have been made. This indicates that the GCF has yet to disburse any project funding for AFOLU related activities in Somalia.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF has approved USD 4.6 million in readiness funding to Somalia, across three readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusion

- Our analysis of the OECD data shows that in the most recent four years (2019-2022), there has been a significant increase in annual funding allocated to AFOLU initiatives in Somalia, with allocated funding being above USD 70 million in each of these years. Prior to this the highest annual allocation total was USD 52 million in 2012. This increase can largely be explained by the World Bank recommencing development assistance to Somalia at the end of 2018.
- Despite this increase, however, climate finance allocations remain significantly below the levels needed to meet the needs outlined in Somalia's NDC. Somalia's NDC indicates that between 2021 – 2030, a total of USD 14.75 billion will be required for AFOLU initiatives (an annual average of USD 1.475 billion). In the period 2021 – 2022, our analysis of the OECD data finds that average annual allocations were USD 136.06 million (this is approximately 9.2% of the annual climate finance needs).
- According to our analysis of the OECD data, all funding allocated for AFOLU related initiatives in Somalia in the period 2010 – 2022 was in the form of grants.
- On a per capita basis, average annual funding received by farmers in Somalia during the period 2010 – 2022 has largely been in line with or above the regional average. The only exceptions were 2015 and 2018, where

it fell marginally below the regional average for the respective years.

- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is actually reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For the majority of allocated funding, the listed recipients are typically national government ministries, or NGOs based in donor countries. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

SOUTH SUDAN

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

South Sudan's Nationally Determined Contribution (NDC) for the period 2021 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within South Sudan's climate agenda. The agriculture sector is of key importance to the South Sudanese economy, during the period under analysis (2011 – 2022), the percentage of the population employed is consistently above 60%. The sector is highly vulnerable to the impacts of climate change.

Additionally, as noted in South Sudan's NDC, the agriculture sector is the largest emitters of GHG emissions with around 74% of the emissions coming from the sector in 2015.

A summary adaptation and mitigation objectives for the AFOLU sector presented in South Sudan's NDC, and projected finance needs are summarised below in Table 1.

Table 1. Summary of AFOLU interventions and projected costs in South Sudan's Nationally Determined Contribution

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
Adaptation	NDC Adaptation Strategies: • Promote climate-smart agriculture, resilient seeds, and community-based watershed management. • Implement digital solutions for market access and rangeland mapping to control overgrazing. • Strengthen livelihoods of pastoralists through sustainable livestock management, insurance systems, and capacity-building. • Establish early warning systems, biodiversity mapping, and natural resource management initiatives. • Promote afforestation, reduce deforestation through alternative energy, and develop waste management policies.	Agriculture, livestock and fisheries: USD 25.5 million. Forestry: USD 0.5 million. Biodiversity, ecosystem, and sustainable wetland management: USD 200.5 million. Total – USD 235 million
Mitigation	The mitigation targets established in South Sudan's NDC include an objective of reducing GHG emissions from the agriculture, livestock and fisheries sector by 18%, compared to the 2017 reference level.	Agriculture, livestock and fisheries: $4,279.7-5,330.8 million. Forestry: $53.5 million.

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
	The NDC also aims for a 70% reduction in deforested areas. South Sudan aims to declare approximately 30% of its natural forests as reserve forests to reduce the high rate of deforestation.	Biodiversity, ecosystem, and sustainable wetland management: $15 million. Total – Between USD 4.35 billion to USD 5.39 billion
Total		**Total projected AFOLU funding needs.** **Up to USD 5.62 billion**

2. Analysis of climate finance flows to South Sudan (2011 – 2022)

This section provides an analysis of climate finance allocated to AFOLU related activities in South Sudan during the period 2011 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2011 – 2022, a total of USD 714.66 million was allocated to AFOLU-related activities in South Sudan. On a year-by-year basis, funding allocations for AFOLU appear to be on an upward trend, in 2011 and 2012 (the first two years after South Sudan was recognised as an independent state) climate finance allocated to AFOLU activities was USD 6.58 million and USD 3.51 million respectively. In 2022 (the most recent annual data available), funding allocated to South Sudan reached USD 150.44 million.

As illustrated in Figure 1 (below), 99.9% of the funding allocated to AFOLU activities in South Sudan has been through grants.

Figure 1. South Sudan – Share of total AFOLU climate finance by instrument (2011 – 2022)

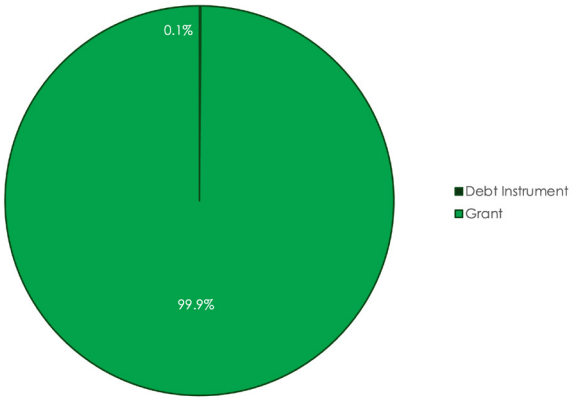
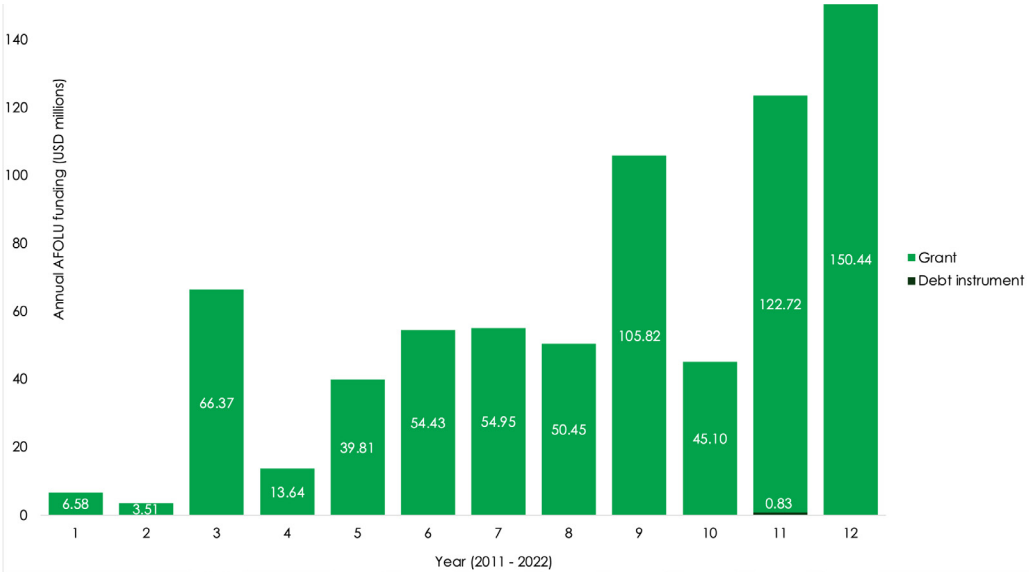
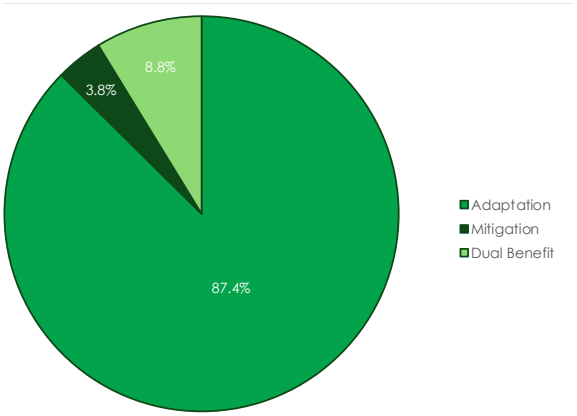


Figure 2. South Sudan – Share of annual climate finance to AFOLU by instrument (2011 – 2022)



As shown in Figure 3 (below), in the period under analysis, adaptation interventions were the focus of most of the allocated funding (87.4% of total). On a year-by-year basis, funding for adaptation interventions has accounted for more than 70% of total allocated funding for AFOLU. The exception was in 2016, when the share for adaptation was 69.4% of the annual funding allocated.

Figure 3. South Sudan – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2011-2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of South Sudan that are employed in agriculture), funding has followed a fairly similar trend to the regional average (for all 15 countries included in this analysis). On a year-by-year basis, prior to 2016, the per capita funding for South Sudan has mostly been below the regional average, with the exception of 2013. After 2016, however, the per capita funding to South Sudan has mostly been in line with, or above the regional average. The only exception was in 2020, where per capita allocated funding fell below the regional average for this year.

Between 2011-2022, 47.6% of the AFOLU-related funding allocated to South Sudan was for projects that had a significant gender focus, 6.1% was allocated for projects where gender was the principal focus, 17.4% of funding had no gender focus, and the remaining 28.8% was for projects where the gender focus was not specified.

Figure 4. South Sudan – Annual per capita AFOLU climate funding to population employed in agriculture (2011 – 2022). National average vs regional average

The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our analysis included a review of the project databases of the main providers of finance to South Sudan. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 73.5% of total funding allocated to AFOLU projects between 2011 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2011 – 2022, the top recipients of funding allocated for AFOLU activities in South Sudan were as follows: National Governments received 28.38% of total funding; NGOs based in donor countries received 19.28%; The World Food Programme received 16.69%; and the remainder was largely distributed amongst multilateral agencies, international NGOs and other public institutions. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 1. South Sudan – Top 5 providers of climate finance for AFOLU projects (2011 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	Germany	164.79	23.1%
2	World Bank	122.94	17.2%
3	Canada	98.97	13.8%
4	The Netherlands	88,80	12.4%
5	African Development Bank	50.08	7.0%

3. Analysis of projects funded by the three main providers of climate finance between 2011-2022

Germany

According to our analysis of the OECD DAC data, Germany allocated USD 164.79 million in climate funding for AFOLU activities in South Sudan between 2011 – 2022 (23.1% of total climate funding). All of this funding was as grants.

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH has been working in the area that is now South Sudan – with some interruptions – for over 50 years and opened an office in the capital Juba in 2010.

GIZ works in South Sudan on behalf of the German Federal Ministry for Economic Cooperation and Development on the following core issues:

- Climate-adapted agricultural and food systems
- Good local governance and rural development
- Gender equality and prevention of sexualized and gender-based violence

GIZ supports smallholder farms as a way of enhancing rural development in South Sudan. It trains farmers on using climate-resistant cultivation methods and on buying agricultural goods such as seed and equipment. This enables the farmers to boost their harvest yields and to contribute to the country's production of healthier and more varied food. GIZ's work has a particular focus on enhancing the participation of women.

Examples of relevant projects in South Sudan include:

- Promoting rural development and agricultural production (2022 – 2028)
- Food security and agricultural development in South Sudan (2017 – 2020)
- Protecting the water resources of Lake Victoria (2022 – 2024)

World Bank

According to the World Bank finance summary for South Sudan, in the period 2011 – 2022, the World Bank disbursed USD 523 million in funding to South Sudan (all of which was via the International Development Association). It is unclear however how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

According to our analysis of the OECD DAC data, the World Bank allocated USD 122.94 million in climate funding for AFOLU activities in South Sudan between 2011 –

2022 (17.2% of total climate funding). All of this funding was as grants.

A review of the World Bank project database found that between 1st January 2011 and 31st December 2022, funding was approved for 10 projects with relevance to AFOLU sectors. Examples include:

- **South Sudan Resilient Agricultural Livelihoods Project** - The objective of this project is to strengthen capacity of farmers and their organizations and improve agricultural production. Total funding allocated by the World Bank was USD 62.5 million.
- **Support to Agriculture and Forestry Development Project** – the objective of this project is to increase the productivity and production of participating smallholder farmers in agriculture and forestry. Total funding allocated by the World Bank was USD 14.27 million.

For the majority of projects World Bank funding was channelled via a national government ministry. It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

Canada

Canada has provided over CAD 1.1 billion in international assistance to South Sudan since 2011, with support covering development programming, humanitarian assistance, and programming to support peace and security. In 2022-2023, Canada provided a total of CAD 136.35 M in international assistance, making South Sudan the 13th largest recipient of Canadian aid. Of this amount, CAD 54.35 M in bilateral development programming was provided to support investments in health, education, food security and inclusive governance. Canada's international assistance seeks to take a feminist, conflict-sensitive, human rights-based and triple nexus approach.

According to our analysis of the OECD DAC data, Germany allocated USD 98.97 million in climate funding for AFOLU activities in South Sudan between 2011 – 2022 (13.8% of total climate funding). All of this funding was as grants.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 30.2 million in project funding to South Sudan. This has all been via one multi-country programme – Building Climate Resilience for Food and Livelihoods in the Horn of Africa (BREFOL). This programme was only approved by the GCF board in July 2024 and, to date, no disbursements have been made. This indicates that the GCF has yet to disburse any project funding for AFOLU related activities in South Sudan.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF has approved USD 600,200 in readiness funding to South Sudan, across two readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusion

- Our analysis of the OECD data shows that in the most recent four years (2019-2022), there has been a significant increase in annual funding allocated to AFOLU initiatives in South Sudan, with allocated funding being above USD 100 million in three out of the four years (and an annual average of USD 106.2 million in this four year period). Prior to this the highest annual allocation total was USD 66.37 million in 2013.
- Despite this increase, however, climate finance allocations remain significantly below the levels needed to meet the needs outlined in South Sudan's NDC. The total projected finance needs for AFOLU indicated in South Sudan's NDC is USD 5.62 billion by 2030. This is broken down into USD 235 million for adaptation initiatives and for mitigation the total is between USD 4.35 billion and USD 5.39 billion by 2030. According to our analysis of the OECD data, average annual allocations for adaptation initiatives in South Sudan's AFOLU sector were on average USD 91.28 million per year between 2020 – 2022. Whilst this appears sufficient to meet the adaptation finance needs (as they are estimated in the NDC), there is a significant finance gap for mitigation. In the period 2020 – 2022, the annual average of combined allocations for mitigation and dual benefit funding were USD 15.01 million per year.
- According to our analysis of the OECD data, 99.9% of funding allocated for AFOLU related initiatives in South Sudan during the period 2011 – 2022 was in the form of grants.
- On a per capita basis, average annual funding received by farmers in South Sudan was largely below or in-line with the regional average from 2011 – 2018. However in three of the last four years, per capita funding to South Sudan has mostly been above the regional average.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For most of the allocated funding, the listed recipients are typically national government ministries, or NGOs based in donor countries. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

SUDAN

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Sudan's Nationally Determined Contribution (NDC) for the period 2021 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Sudan's climate agenda. During the period under analysis (2010 – 2022), the percentage of the population employed in agriculture was consistently between 40 – 45%. This indicates that the sector is critical to the livelihoods of a large proportion of the population (particularly those living in rural areas). Sudan's National Adaptation Plan notes that the majority of the agricultural workforce are involved in subsistence agriculture, and are highly vulnerable to climate impacts, as such there are significant adaptation needs.

Table 1. Summary of AFOLU interventions and projected costs in Sudan's Nationally Determined Contribution

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) and USD (millions)
Adaptation	Agriculture: • Climate resilient agriculture, crop production, irrigated cropping systems. • Resilient rangelands, livestock production systems	USD 830 million (all agriculture)
Mitigation	Forestry: • Restoration and sustainable management of degraded forest reserve and Gum Arabic belt; Afforestation and restoration of degraded lands in 10% of rainfed areas and 5% of irrigated agriculture scheme areas; Restoration/ conservation of mangrove forests in Red Sea State • Implementation of the National REDD+ Strategy in Blue Nile, Gadarif and Sinnar States • 45% reduction in emissions by 2030	USD 157 million (all forestry)
Total		**USD 987 million**

2. Analysis of climate finance flows to Sudan (2010 – 2022)

This section provides an analysis of climate finance flows to AFOLU related activities in Sudan during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 770.06 million was allocated to AFOLU-

related activities in Sudan. On a year-by-year basis, allocated funding has generally been on an upward trend, growing from USD 3.12 million in 2010 to USD 138.22 million in 2022. All the climate finance allocated to AFOLU activities in this period is being provided as grant funding.

Figure 1. Sudan – Share of total AFOLU climate finance by instrument (2010 – 2022)

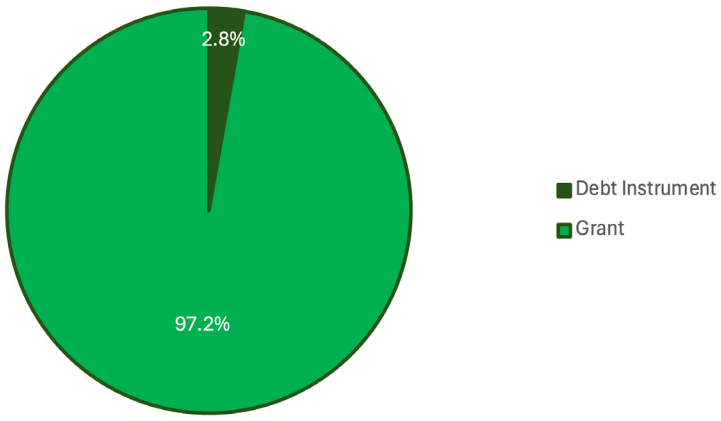
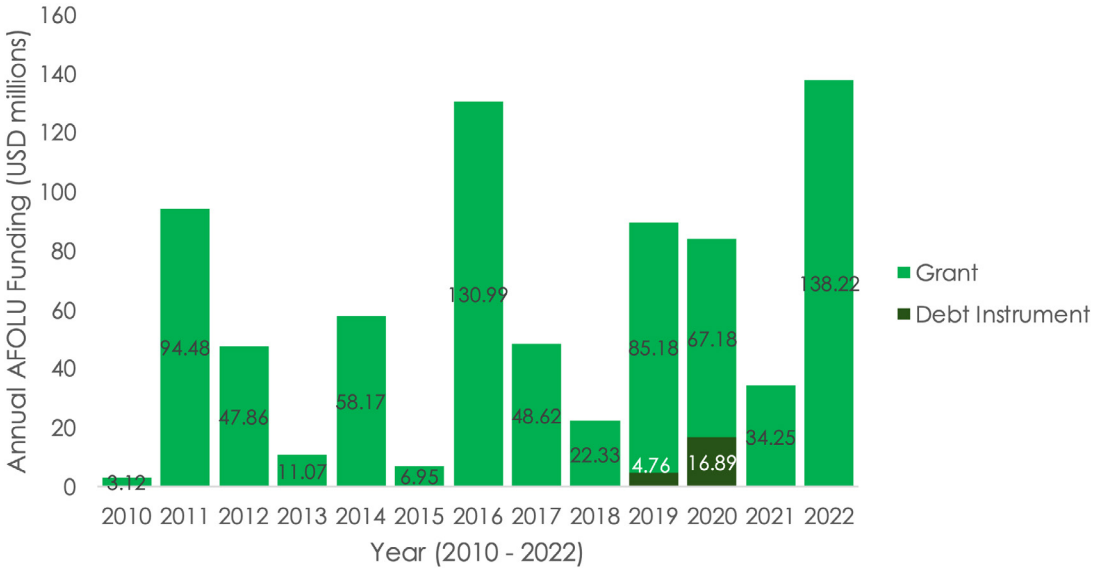
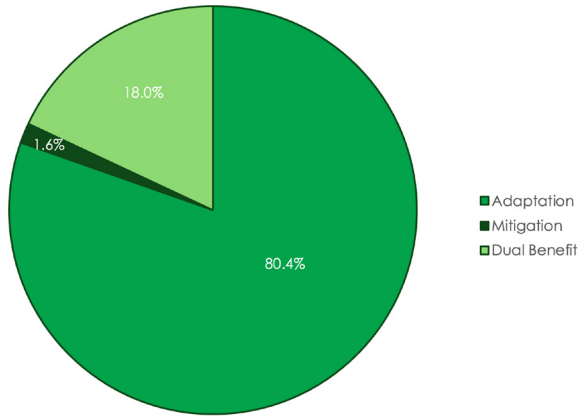


Figure 2. Sudan – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3, most funding in this period (80.4%) was allocated to adaptation interventions. On a year-by-year basis, adaptation has accounted for more than 65% of annual allocated funding in every year except for 2010 and 2022. Adaptation funding accounting for a significant share of total funding is unsurprising, given the vulnerability of the agriculture sector to climate impacts.

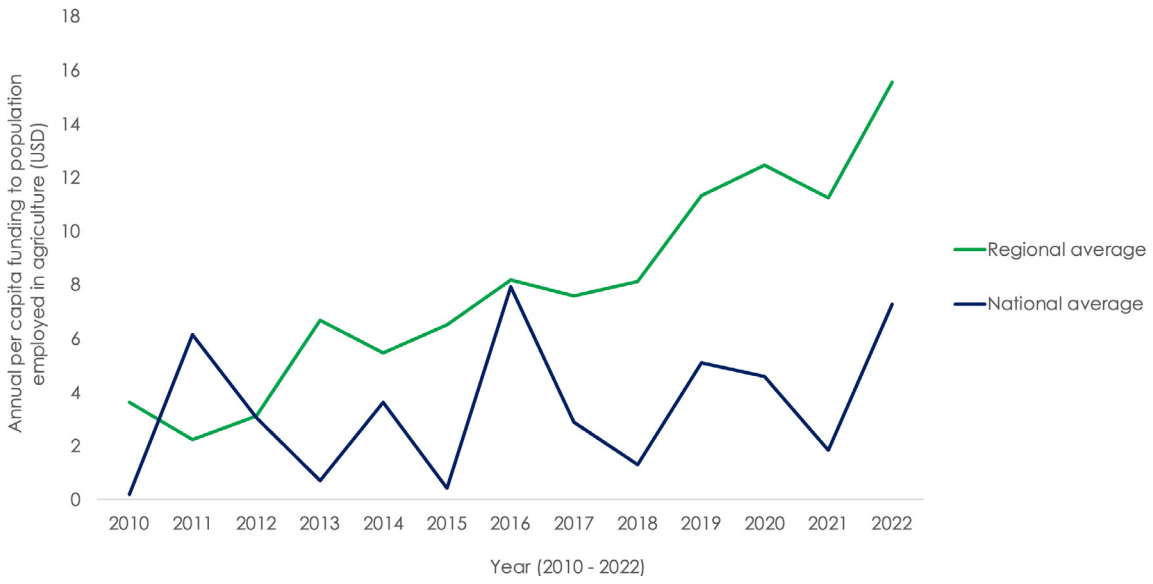
Figure 3. Sudan – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of Sudan that are employed in agriculture), funding has been significantly below the regional average (for all 15 countries included in this analysis) in almost ever year under review. The only exceptions were in 2011 (where Sudan exceeded the regional average), and 2016 (where per-capita funding was in line with the regional average for that year).

Between 2010-2022, 39% of the AFOLU-related funding allocated to Sudan was for projects that had a significant gender focus, 15% was allocated for projects where gender was the principal focus, 18.9% of funding had no gender focus, and the remaining 27.1% was for projects where the gender focus was not specified.

Figure 4. Sudan – Annual per capita AFOLU climate funding to population employed in agriculture (USD). National average vs regional average (2010 – 2022)



The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our

analysis included a review of the project databases of the main providers of finance to Sudan. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 66.5% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Sudan were as follows: National Governments received 18.43% of total funding; Third country governments received 14.36% of funding; The World Food Programme received 11.1% of funding; NGOs based in donor countries received 8.61%; The CGIAR Fund received 7.87%; 6.67% went to unspecified recipients; and the remainder was largely distributed amongst multilateral agencies, international NGOs and other public institutions. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 1. Sudan – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	EU Institutions (excluding the EIB)	219.36	28.5%
2	African Development Bank	80.74	10.5%
3	IFAD	79.30	10.3%
4	Germany	66.52	8.6%
5	United States of America	66.45	8.6%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

European Union

The main priorities for the European Union in Sudan are to contribute to promoting peace, improving governance and sustainable development for all. The specific objectives of EU cooperation are:

- Promoting human rights and the rule of law, in the framework of a democratic transition
- Pursuing sustainable development and enhancing resilience and livelihoods of the most vulnerable populations
- Encouraging participation of women and youth
- Providing a comprehensive response to the migratory and displacement challenges
- Cross cutting: implementing the humanitarian-development nexus.

According to our analysis of the OECD DAC data, the EU Institutions allocated USD 219.36 million in climate funding for AFOLU activities in Sudan between 2010 – 2022 (28.5% of total climate funding). All of this funding was as grants.

As Sudan has not ratified the revised Cotonou Agreement. the country was ineligible to receive funds from the European Development Fund. Nonetheless, the EU provided EUR 160 billion for the period 2016-2019 which have been implemented through the EU Emergency Trust Fund for Africa.

According to the EU's Fourth Biennial Update Report to the UNFCCC, relevant initiatives funded in Sudan includes:

- The Pro Resilience Action – (PRO-Act) aims to build resilience to food crisis and strengthen food security. Multi-Country: Cameroon, The Republic of Chad, Democratic People's Republic of Korea, Democratic Republic of Congo, Mozambique, Nigeria, Sudan, Syria. The EU has committed USD 38.96 million to this initiative.

African Development Bank

According to our analysis of the OECD DAC data, the AfDB allocated USD 80.74 million in climate funding for AFOLU activities in Sudan between 2010 – 2022 (10.5% of total climate funding). Of this funding, USD 63.85 million (79.1%) was as grants, with the remaining USD 16.89 (20.9%) of this funding was as debt instruments.

AfDB programmes in Sudan include:

- **Technologies for African Agricultural Transformation** – Promoting new seed technology by providing access to better quality heat-tolerant seeds and technical training to smallholder farmers. Overall, the Technologies for African Agricultural Transformation program is doubling the productivity of maize, rice, wheat and six other vital commodities. By November 2020, 10.6 million farmers had already benefited from the initiative. The Bank is on track to meet its target of reaching 40 million farmers by 2025, according to its 2021 Annual Development Effectiveness Review. This project was implemented in Sudan between 2018 – 2021.[1]
- **Emergency wheat production initiative** – this programme was financed by the AfDB (USD 75 million) and implemented by the World Food Programme. The project distributed climate-adapted wheat seeds and fertilizers to over 170,000 smallholder farmers in the five states during the 2023-2024 agricultural season, covering areas largely located in the relatively stable northern and eastern states of Sudan where conflict has not yet spread, as well as conflict-affected areas such as Gezira and White Nile states. The yield of 645,000 metric tonnes of wheat this year accounted for 22 percent of the total wheat consumption needs of Sudan. On average, farmers reported a 44 percent increase in productivity per hectare as compared to the previous season. Around 16,000 of the farmers who received support had been newly displaced by conflict in the last 13 months. The project offered support and resources for these farmers to rebuild their livelihoods. In addition, 12 harvester machines were provided to farmers' associations in River Nile and Northern states to enable them harvest more efficiently to significantly reduce losses.[2]

1 African Development Bank (24th November 2021), Sudan sees record harvest as agricultural technologies reach 10.6 million farmers in 2020

2 African Development Bank (20th June 2024), African Development Bank, WFP project boosts wheat production in war-torn Sudan amid soaring hunger

International Fund for Agricultural Development (IFAD)

According to our analysis of the OECD DAC data, IFAD allocated USD 79.3 million in climate funding for AFOLU activities in Sudan between 2010 – 2022 (10.3% of total climate funding). Of this funding, USD 74.54 million (94%) was as grants, with the remaining USD 4.76 million (6%) of this funding was as debt instruments.

The IFAD webpage for Sudan notes that IFAD has provided USD 381.13 million in financing to Sudan across 22 projects.

IFAD loans and grants help increase agricultural production through promoting climate resilient and sustainable practices, building infrastructure, and improving access to agricultural extension services, markets and financing.

IFAD's country strategic opportunities programme for 2021-2027 aims to address food insecurity, vulnerability to climate change and youth unemployment by:

1. Strengthening the resilience of vulnerable rural people and their production systems.
2. Improving the performance of key agricultural value chains that create employment and wealth for rural people by working with both the public and private sectors.
3. Improving sustainable natural resources management, establishing a sustainable seed system and operating a sustainable pro-poor rural financial system.

Notable IFAD projects and programmes in Sudan include:

- The Sustainable Natural Resources and Livelihoods Programme – SNRLP's goal is to increase the food security, incomes and resilience of pastoralists, agropastoralists and smallholders engaging in joint natural resource-related activities. The objective is to increase production, secure access to natural resources for vulnerable users and improve the sustainability of natural resource-related livelihoods, by scaling up community-based natural resource governance practices, technologies and business models. This programme is being implemented between 2019 – 2027. The total cost of this initiative is USD 86.69 million, with IFAD providing USD 62.94 million, all of the funding is in the form of grants.

The recent conflict in Sudan has restricted the delivery of programmes. Currently, IFAD-financed projects provide inputs, access to finance and agricultural extension services to smallholders in project areas that are not directly affected by the conflict.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 44.4 million in project funding to Sudan. This funding is spread across two projects and one multi-country programme that includes Sudan.

Our analysis found that each of these projects and programmes had relevance to the AFOLU sector. Across these projects and programmes, our analysis estimates that USD 8.21 million has been disbursed to date, this is 18.5% of the estimated funding allocated to AFOLU. Because there were no additional projects or programmes that had focus beyond AFOLU, this effectively means that only 18.5% of all funding allocated to Sudan has been disbursed (across all sectors).

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries.

For further details please refer to the methodology section.

Additionally GCF has approved USD 3.2 million in readiness funding to Sudan, across four readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusions

- Our analysis of the OECD data for Sudan indicates that current levels of allocated funding for AFOLU are almost in line with the annual average projected funding needs. Sudan's NDC indicates that between 2021 – 2030, a total of USD 987 million will be required for AFOLU sector targets – an average of USD 98.7 million each year during this period. Our analysis found that in 2021 and 2022, average funding allocations to the AFOLU sector were USD 86.23 million.
- According to our analysis of the OECD data, 97.2% of funding allocated for AFOLU related initiatives in Sudan during the period 2010 – 2022 was in the form of grants.
- On a per capita basis, average annual funding received by farmers has been either below or in line with the regional average in all years except 2011.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For most of the allocated funding, the listed recipients are typically national government ministries, or NGOs based in donor countries. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

UGANDA

1. Overview of adaptation and mitigation targets in the AFOLU sector and associated climate finance needs

Uganda's Nationally Determined Contribution (NDC) for the period 2022 – 2030 sets out national climate adaptation and mitigation targets. AFOLU is a priority sector within Uganda's climate agenda. The agriculture sector is of key importance to Uganda's economy, during the period under analysis (2010 – 2022), the percentage of the population employed in agriculture ranges between 66% - 71%. The sector is highly vulnerable to the impacts of climate change.

A summary adaptation and mitigation objectives for the AFOLU sector presented in Uganda's NDC are summarised below. Uganda's NDC does not provide specific costing for AFOLU objectives, but the total cost of adaptation and mitigation objectives (across all sectors) is USD 28.1 billion. Of this total USD 17.7 billion is for adaptation interventions, USD 10.3 billion is for mitigation, and the remaining USD 0.1 billion is for cross-cutting activities. The Ugandan government will provide 15% of total funding, with the remainder conditional on international support. Given the importance of agriculture to Uganda's economy, the finance needs for AFOLU are likely to account for a significant share of this total (particularly for adaptation interventions).

Table 1. Summary of AFOLU interventions and projected costs in Uganda's Nationally Determined Contribution

Adaptation / Mitigation	Objectives	Funding needs FCFA (billions) / USD (millions)
Adaptation	The vulnerability and risk assessment indicated that the priority sectors for adaptation in Uganda remain ecosystems, water, agriculture, and forestry. Adaptation measures in the AFOLU sector include outcomes such as increased forest cover, a climate resilient and sustainable agriculture sector, and enhanced ecosystems resilience.	Total finance needs (across all sectors) is USD 17.7 billion
Mitigation	• In the AFOLU sector, the priority mitigation policies and measures are from REDD+ activities, based on the National REDD+ Strategy and Action Plan published in 2017 (MWE, 2017). • Uganda has committed to halt and reverse forest loss and land degradation by 2030 and to increase forest cover from an estimated 12.5% in 2020 to 15% in 2025 and 21% in 2030. In addition, the country launched a 40 million tree campaign on 2 March 2021, focussing on forest restoration using indigenous trees.	Total finance needs (across all sectors) is USD 10.3 billion
Total		**AFOLU funding needs are not specified but overall costs are estimated at USD 28.1 billion**

2. Analysis of climate finance flows to Uganda (2010 – 2022)

This section provides an analysis of climate finance allocated to AFOLU related activities in Uganda during the period 2010 – 2022. This is based on climate-related development finance recorded by the OECD DAC.

Between 2010 – 2022, a total of USD 2.46 billion was allocated to AFOLU-related activities in Uganda. On a year-by-year basis, funding allocations for AFOLU appear to be on an upward trend, growing from a base of USD 9.71 million in 2010, to a peak of USD 523.83 million in 2020. Grant funding accounted for 63.9% of the total funding in this period. Less positively, however, the percentage of grant funding as a share of annual allocations is decreasing, with debt instruments making up a more significant share. This indicates that much of the additional funding is being provided as loans. In the period between 2018 – 2022, debt instruments have accounted for approximately 52% of total funding allocated to AFOLU activities (reaching an annual peak of 65.6% of total funding in 2020).

Figure 1. Uganda – Share of total AFOLU climate finance by instrument (2010 – 2022)

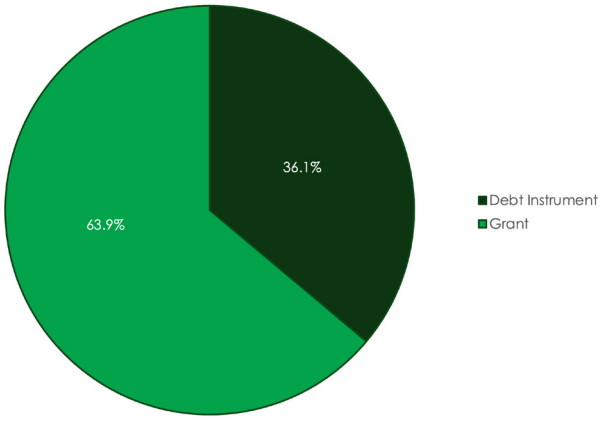
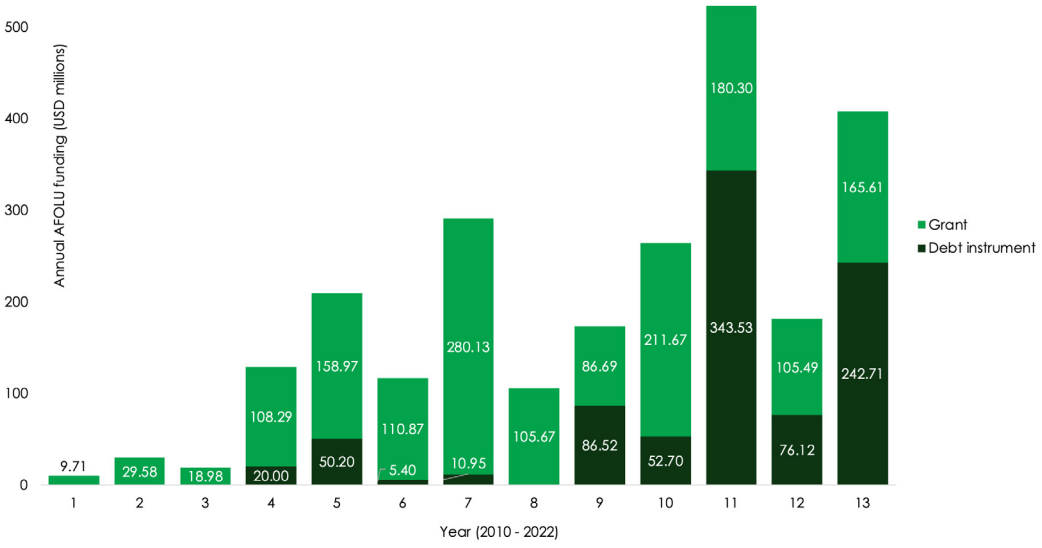
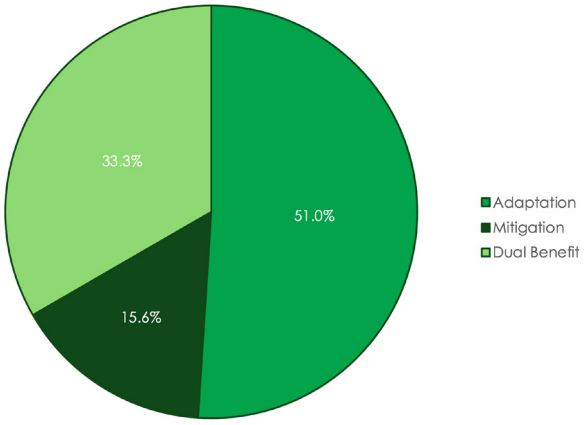


Figure 2. Uganda – Share of annual climate finance to AFOLU by instrument (2010 – 2022)



As shown in Figure 3 (below), in the period under analysis, adaptation interventions were the focus of most of the allocated funding (51% of total). On a year-by-year basis, there is wide variation on the share of annual allocated funding going to adaptation / mitigation / cross-cutting interventions. There were four years in the period where adaptation received more than 65% of annual allocated funding, and four years where more than 60% of annual funding was for dual-benefit activities.

Figure 3. Uganda – Adaptation / Mitigation / Dual Benefit as a share of total climate finance for AFOLU (2010-2022)



As shown on in Figure 4 (below), on a per capita basis (to the population of Uganda that are employed in agriculture), funding has followed a fairly similar trend to the regional average (for all 15 countries included in this analysis). On a year-by-year basis, the per capita funding for Uganda has mostly been below the regional average, This has been the case in every year besides 2014, 2016, and 2020, where per capital funding slightly above the regional average.

Between 2010-2022, 37.9% of the AFOLU-related funding allocated to Uganda was for projects that had a significant gender focus, only, 3.8% was allocated for projects where gender was the principal focus, 13.9% of funding had no gender focus, and the remaining 44.3% was for projects where the gender focus was not specified.

Figure 4. Uganda – Annual per capita AFOLU climate funding to population employed in agriculture (USD). National average vs regional average (2010 – 2022).

The OECD DAC data provides limited detail on the specific activities which are being funded, and does not provide detail on how much of the allocated funding has been disbursed. To get a better sense of these elements, our analysis included a review of the project databases of the main providers of finance to Uganda. These were identified by the institutions providing the greatest volume of funding in the period under consideration (see Table 2 below). Key findings from this analysis are presented in section 3 of this brief.

As noted in Table 2 below, the five highest providers of climate finance in this period accounted for approximately 62% of total funding allocated to AFOLU projects between 2010 – 2022.

It is unclear from the OECD DAC data the extent to which funding is reaching the local level. Based on analysis of the OECD data to determine recipients of funding in the period 2010 – 2022, the top recipients of funding allocated for AFOLU activities in Uganda were as follows: National Governments received 52.44% of total funding; NGOs based in donor countries received 8.24%; 6.15% went to unspecified recipients; 3.11% went to private sector institutions (predominantly in provider countries, rather than domestic); the remainder was largely distributed amongst multilateral agencies, international NGOs and other public institutions. It appears based on this that very little funding is being channelled directly to local stakeholders, however the OECD database does not provide details of how allocated funding is spent.

Table 1. Uganda – Top 5 providers of climate finance for AFOLU projects (2010 – 2022)

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
1	World Bank	690.22	28.1%
2	EU Institutions (excluding the EIB)	262.11	10.7%

Rank	Name of Institution	Total Funding (USD million)	Share of total (%)
3	Denmark	260.82	10.6%
4	Germany	154.94	6.3%
5	The Netherlands	153.77	6.3%

3. Analysis of projects funded by the three main providers of climate finance between 2010-2022

World Bank

According to the World Bank finance summary for Uganda, in the period 2010 – 2022, the World Bank disbursed USD 3.887 billion in funding to Uganda (all of which was via the International Development Association). It is unclear however how much of this is climate-finance and what proportion of this funding was for AFOLU related projects.

According to our analysis of the OECD DAC data, the World Bank allocated USD 690.22 million in climate funding for AFOLU activities in Uganda between 2010 – 2022 (28.1% of total climate funding). Of this funding, USD 597 million (86.5%) was debt instruments, and the remaining USD 93.22 million (13.5%) was as grants.

A review of the World Bank project database found that between 1st January 2010 and 31st December 2022, funding was approved for 20 projects with relevance to AFOLU sectors. Examples of projects funded by the World Bank include:

- **Uganda Climate Smart Agricultural Transformation Project** – the objective of this project is to increase productivity, market access, and resilience of select value chains in the project area and to respond promptly and effectively to an eligible crisis or emergency. Funding allocated by the World Bank was USD 350 million.
- **Irrigation for Climate Resilience Project** – the objective of this project to provide farmers in the project areas with access to irrigation and other agricultural services, and to establish management arrangements for irrigation service delivery. Funding allocated by the World Bank was USD 169.2 million.
- **Agriculture Cluster Development Project** – the objective of this project is to raise on-farm productivity, production, and marketable volumes of selected agricultural commodities in specified geographic clusters. The proposed project will adopt a phased approach, starting in a small number of clusters with one or two commodities, and then building toward broader geographic coverage including all five selected commodities. Total funding allocated by the World Bank was USD 150 million.

For the majority of projects World Bank funding was channelled via a national government ministry. It is unclear how much of the funds were intended for local communities, and where this was the case, how much funding reached the intended beneficiaries.

EU Institutions

According to our analysis of the OECD DAC data, the EU Institutions allocated USD 262.11 million in climate funding for AFOLU activities in Uganda between 2010

– 2022 (10.7% of total climate funding). All of this funding was as grants.

The Multiannual Indicative Programme (2021 – 2027) for Uganda amounts to EUR 375 million. It focuses on the following priority areas:

- **Green and Climate Transition** - contributes to better conservation, restoration and protection of Uganda's natural resources and biodiversity. Furthermore, it promotes sustainable development of the forestry sector, supports Uganda in improving its disaster risk management approach, develops financing for climate action and effectively contributes to streamlining the European Green Deal in sustainable urban and peri-urban development for Uganda's move towards green, inclusive, smart and productive cities. Allocated funding is EUR 94 million
- **Promoting sustainable and inclusive Growth and Jobs** - focuses on the support of the productive sectors' sustainable energy, transport and digital connectivity while promoting employment. Allocated funding is EUR 168 million.
- **Promoting Democratic Governance and Social Inclusion** - contributes toward a strengthened democracy and human rights, where institutions can be effective and accountable with increased inclusive delivery of basic social services. Allocated funding is EUR 94 million.

Additionally, The START Facility, funded with EUR 11.5 million, supports Ugandan agribusinesses through concessional loans, technical assistance grants, and credit guarantees. The EUR 50 million EIB loan to Centenary Rural Development Bank (CERUDEB) benefits microentrepreneurs, especially women, aiming for nearly 2 million loans over seven years. The EUR 12 million EU and Denmark investment in the Agricultural Business Initiative (ABI) aids 200,000 Ugandan farmers in improving climate resilience and productivity via matching grants and Business Development Services (BDS).

Denmark

Denmark has been providing development support to Uganda for three decades. Over this period, Denmark has provided support within the areas of education, health, roads, water and sanitation, climate change, agriculture, private sector development and trade, and good governance.

The Strategic Framework between Denmark and Uganda for the period 2023-2028 aims to strengthen regional and national stability and prosperity by supporting Uganda in achieving a green, sustainable and inclusive economic transformation, respecting human rights while continuing to host refugees from neighbouring countries.

Denmark will pursue this vision through three strategic objectives, in line with Danish political priorities and key national development objectives of Uganda:

- Promote a green, sustainable and inclusive economic transformation (USD 24 million);
- Promote sustainable and durable solutions for refugees and support Uganda's stabilising role in the region (USD 47 million); and
- Strengthen democratic values, protection of human rights and civic space (USD 11 million).

According to our analysis of the OECD DAC data, Denmark allocated USD 260.82 million in climate funding for AFOLU activities in Uganda between 2010 – 2022 (10.6% of total climate funding). All of this funding was as grants.

Green Climate Fund

As of October 2024, the Green Climate Fund has approved a total of USD 100.7 million in project funding to Uganda. This funding is spread across 13 projects and programmes which span multiple sectors (including several multi-country programmes which include Uganda).

Our analysis found that eight of these projects and programmes had relevance to the AFOLU sector, and that for this group, GCF funding allocated to Uganda totalled USD 74.3 million (approximately 73.8% of the total GCF funding allocated to Uganda). Across these eight projects and programmes, our analysis estimates that USD 36.4 million has been disbursed to date, this is 49% of the estimated funding allocated to AFOLU.

These estimates (of total funding allocated and disbursed to AFOLU activities) are based on a methodology that uses the GCF's guidance that for multi-country programmes approved GCF funding is allocated equally across programme countries, we also assumed an equal distribution of disbursed funding across all programme countries. For further details please refer to the methodology section.

Additionally GCF has approved USD 4.6 million in readiness funding to Uganda, across three readiness activities, however it is unclear how much of this funding has been disbursed, and what proportion is relevant to AFOLU initiatives.

It is unclear on an individual project basis what the exact breakdown of female beneficiaries are. However, the GCF project database states that across all funded activities the average percentage of female beneficiaries is 49.1%.

4. Conclusions

- Uganda's NDC does not provide a breakdown of finance needs by sector, however the total climate finance needs until 2030 are USD 28.1 billion (of which USD 17.7 billion is for adaptation, and USD 10.3 billion is for mitigation). Given the importance of agriculture ot Uganda's economy, it is likely that the AFOLU sector will account for a significant share of these finance needs (particularly related to adaptation).
- Whilst it is unclear what the AFOLU finance gap in Uganda is, promisingly, in the last three years, our analysis of the OECD data found that average annual funding allocations to AFOLU in Uganda have been USD 371.25 million.
- According to our analysis of the OECD data, 63.9% of funding allocated for AFOLU related initiatives in Uganda during the period 2010 – 2022 was in the form of grants. Concerningly, however, from 2018 onwards, debt instruments are accounting for an increasingly large proportion of annual allocated funding (more than 40% of annual funding allocations in four out of five years between 2018 – 2022). Whilst Uganda is not currently considered as in or at risk of debt distress by the IMF, the country has had its credit rating downgraded since 20201. There is thus a concern about the affordability of climate finance in the form of debt for Uganda going forward.

1 Climate Policy Initiative (October 2024), Landscape of Climate Finance in Africa 2024

- On a per capita basis, average annual funding received by farmers has been either below or in line with the regional average in all years except 2011.
- It is challenging to determine exactly how much of the total allocated funding has been disbursed, and it is even more difficult to ascertain how much of this funding is reaching smallholders and MSMEs that are on the front lines of the climate crisis.
- For most of the allocated funding, the listed recipients are typically national government ministries, or NGOs based in donor countries. The OECD DAC database and project databases of key providers of finance, do not provide sufficient clarity on how funding is being invested.

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Analysis of data on tracked climate finance to AFOLU used data from. The Organisation for Economic Co-operation and Development's Development Assistance Committee (OECD-DAC). The period under consideration was 2010 – 2022.

Analysis of allocated and disbursed funding from the Green Climate Fund used information on the GCF's website (for relevant countries and projects / programmes).

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