



The Global Innovation Lab for Climate Finance

Guidelines
2026

TABLE OF CONTENTS

1.	INTRODUCTION.....	3
1.1	Purpose of these guidelines	3
1.2	Overview of the Global Innovation Lab for Climate Finance.....	3
2.	LAB PROCESS AND METHODOLOGY	5
2.1	Phase 1: Call for Ideas and Selection [SEPTEMBER to FEBRUARY]	6
2.2	Phase 2: Vehicle Design [MARCH - MAY]	7
2.3	Phase 3: Implementation Design and Impact [JUNE – AUGUST]	8
2.4	Endorsement	9
2.5	Phase 4: Ongoing Support & Monitoring	9
3.	ROLES AND RESPONSIBILITIES	11
3.1	The Lab Steering Group	11
3.2	Lab Members	11
3.3	Lab Secretariat and Analytical Provider.....	13
3.4	Lab Experts and Working Groups	14
3.5	Idea Proponents and Implementing Entities	14
3.6	Donors and Investors	15
4.	PRINCIPLES OF ENGAGEMENT AND INTELLECTUAL PROPERTY	15
5.	EXTERNAL COMMUNICATIONS	17
5.1.	External communications goals	17
5.2.	External communications activities.....	17
5.3.	Use of the Lab's logo and materials.....	17

1. INTRODUCTION

1.1 PURPOSE OF THESE GUIDELINES

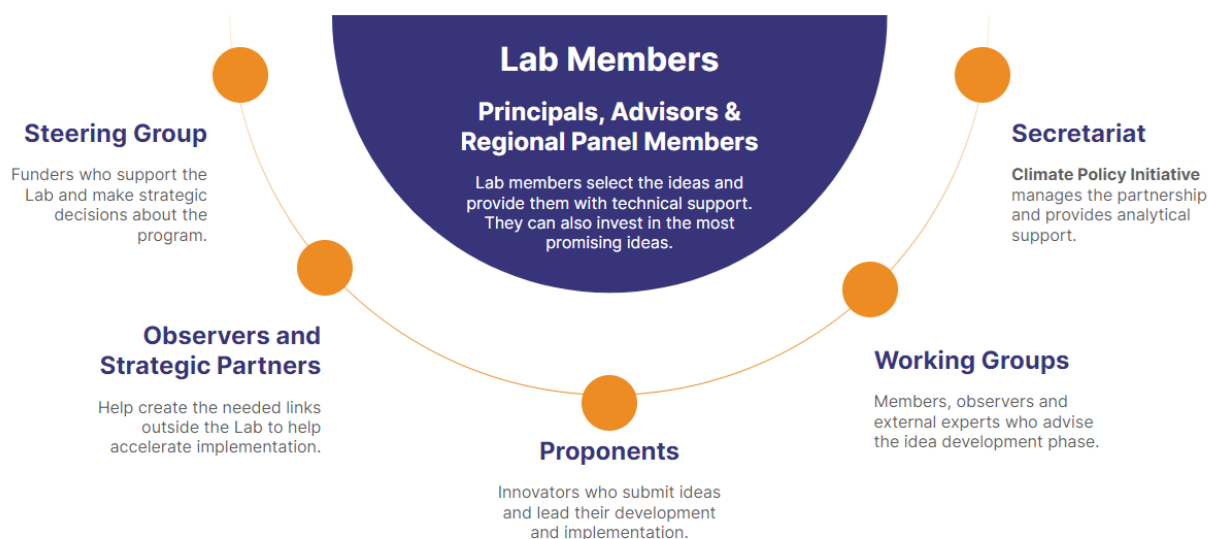
The Lab Guidelines are intended to serve as a key framework for the initiative, guiding Lab Members, participants, and interested parties about the Lab process.

1.2 OVERVIEW OF THE GLOBAL INNOVATION LAB FOR CLIMATE FINANCE

As nations and businesses work to tackle climate challenges and development goals, access to finance has emerged as a critical element. Private investors – often supported by public policy and finance – are already channeling significant amounts of money into the low-carbon economy in countries worldwide, but much more investment is needed. This is particularly true for developing countries, which often face difficulties attracting private investment at the scale required to reach their sustainable development and energy access goals.

Established in 2014, the Lab contributes to this collective effort by identifying and launching transformational proposals in developing countries that will mobilize private investment at scale. The Lab network accelerates well-designed financial solutions that can unlock billions for climate adaptation, energy efficiency, renewable energy, sustainable transport, climate-smart agriculture, and curbing deforestation while also reducing private investors' risks and improving their financial returns. A public-private partnership, the Lab brings together and catalyzes government and private sector efforts to scale up climate finance.

Figure 1: The Lab Governance and Organizational Structure



As of September 2025, the Lab has supported, developed, and endorsed 87 financial vehicles that collectively mobilized over USD 4.2 billion, with USD 1.6 billion in private investment, for action on climate change and sustainable development. The G7 and the Governments of Brazil and India have endorsed the Lab. In 2021, the Lab won the United Nations Global Climate Action Award, which recognizes the world's most innovative, scalable, and replicable examples of action to tackle climate change.

The Lab operates in annual cycles that begin with crowd-sourcing ideas. Selected ideas are then developed, drawing on a combination of political, technical, institutional, and financial

resources to turn them into bankable solutions designed to address specific barriers to driving climate finance at scale. Finally, the cycle's close is marked by the endorsement and launching of these vehicles.

The Lab also provides technical support post-endorsement to help get the solutions off the ground. While the Lab itself does not guarantee funding for the implementation of the vehicles, the Lab Secretariat will facilitate bilateral discussions between Idea Proponents and funders. Proponents may be invited to apply to the Lab Pre-Seed facility which offers conditional grants to a **subset** of endorsed vehicles (see Phase 4: Ongoing Support & Monitoring).

Climate Policy Initiative (CPI) is the Lab Secretariat and analytical provider. The Lab has now entered its twelfth cycle, which is funded by the UK Department of Energy Security and Net Zero (DESNZ), the UK Foreign, Commonwealth, and Development Office (FCDO), the German Federal Ministry for Economic Affairs and Climate Action of Germany (BMWK), the Government of Canada, the United Nations Development Programme (UNDP), and Bloomberg Philanthropies. These funders make up the Lab's Steering Group, which guides and manages the Lab's strategic direction and oversees the Secretariat's work. The Lab activities are carried out with CPI's in-kind support.

The Lab's model draws heavily on its membership, which includes high-level representatives from governments, investment banks, insurance companies, project developers, and development finance institutions worldwide (see Lab Members). Lab Proponents are those who submit an idea to the Lab (and are also the lead implementers). Lab Members, which include Global Lab Principals and Advisors and regional stream Panel Members, select high-potential ideas and guide their development through design and piloting. While financial investment is not required, Members may choose to invest based on their interests and investment strategies. Working Group (WG) members and observers provide expert advice and build the network for Lab solutions to accelerate implementation (see Figure 1).

The Lab aims to influence the climate finance conversation by demonstrating real solutions that work on the ground. Lessons learned from each cycle are incorporated into subsequent cycles, and the Lab shares these solutions with the broader sustainable development community (see EXTERNAL COMMUNICATIONS).

2. LAB PROCESS AND METHODOLOGY

The Lab works towards the identification and initial market testing (e.g., the launch of pilot or first fund) of transformative ideas, which are evaluated as such by their innovative, actionable, and catalytic character and by their ability to achieve financial sustainability over time. Each solution is also evaluated for the potential value-add of the Lab program. These are the core Lab criteria used for selecting ideas and for the analysis completed throughout the Lab process. Box 1 describes the criteria in greater detail.

A complete Lab Cycle operates over 12 months (see Figure 2). Lab Members are convened throughout the cycle to fine-tune and challenge the selected ideas. The Lab's 2026 Cycle will run from September 2025 to October 2026, with most of the analytical work concluding in August 2026. This 12-month cycle includes three distinct analytical phases, concluded with endorsement: Phase 1 (Call for Ideas and Selection), Phase 2 (Vehicle Design), and Phase 3 (Implementation Pathway and Impact). Following Endorsement, Proponents and the Secretariat collaborate to support their implementation during Phase 4 (Ongoing Support & Monitoring).

Figure 2: An Overview of the Lab Process



SEPT - DEC

Call for Ideas

The Lab publicizes an open call for innovative sustainable investment solutions.



JAN - FEB

Selection

Lab Members select the most promising ideas to take forward in each annual cycle.



MAR - AUG

Development

Selected ideas benefit from 7 months of analysis, stress-testing, and guidance from experts and investors.



SEP

Endorsement & Launch

Lab Members vote to endorse and launch the ideas for piloting.



OCT - ONWARD

Implementation

The ideas move into action and fundraising to launch pilots, with continued support from the Lab network.

Box 1: The Lab Criteria

Innovative: A vehicle is innovative when it demonstrates the ability to address, directly or indirectly, barriers to private climate finance that are not yet being addressed by the market or (2) that will be addressed in an improved manner compared to other approaches.

Actionable: A vehicle is actionable when it clearly identifies (1) the type of entity(ies) that could implement it, (2) a pathway towards setting up a market test for the idea (e.g., pilot, first fund), including the timeframe, activities and key milestones, and (3) possible challenges to setting-up the market test for the idea and related management strategies.

Financially sustainable: A vehicle is financially sustainable when it identifies a realistic strategy to (1) operate on a commercial basis, having phased out any public, concessional, or other catalytic financial support, and (2) achieve its intended long-term objectives and overcome key implementation challenges.

Catalytic: A vehicle is catalytic when it demonstrates the potential to (1) mobilize private climate capital within a sizeable market, (2) be scaled up or replicated in other contexts, and (3) achieve positive climate, development, and environmental impacts.

Lab Fit – Value Add: The Lab seeks to offer a significant value-add to the success of the selected ideas and teams, ensuring the capabilities of the Lab team and network complement the proposing team's capabilities and needs. We look forward to working with teams with sufficient time and a functional governance structure to participate fully in the Lab process.

2.1 PHASE 1: CALL FOR IDEAS AND SELECTION [SEPTEMBER TO FEBRUARY]

Lab Cycles commence with an international 'Call for Ideas,' launched to crowd-source and identify innovative ideas for concept development. The 2026 cycle will center on regional streams to leverage local expertise tailored to the specific financial and climate landscape in target countries. The Lab will organize five regional programs: Brazil, East and Southern Africa, India, Latin America and the Caribbean, and The Philippines. The corresponding 2026 streams are listed in Figure 3.

Figure 3: 2026 Streams



The application for the Lab is a two-step process.

- Applicants will first submit a Preliminary Application due November 9th, 2025.
- After a short review period, selected applicants will be invited to submit a Full Application by early-December 2025.

Preliminary Application submissions received after the official deadline of November 9th or those that are incomplete will not be considered.

Ideas are submitted by idea Proponents acting in an individual capacity through a dedicated website, <https://www.climatefinancelab.org/call-for-ideas/>; Proponents can include experts and entrepreneurs from public institutions, the private sector, and civil society, such as think tanks and academics (see ROLES AND RESPONSIBILITIES). The Preliminary Application and Full requests information regarding the mechanism design and how the vehicle intends to meet the Lab criteria (see Box 1).

To identify the most promising solutions, ideas submitted through the Call For Ideas are assessed against the Lab criteria, workstream priorities, and regional contexts. The Secretariat first screens all submissions using the standard Lab criteria and a methodological approach. High-scoring applicants will be invited to submit a Full Application. Full proposals will go through a second round of review and scoring. Lab Members select high-quality, eligible ideas to move to the subsequent phases for additional in-depth analysis and development. The number of solutions selected at each analysis phase depends on the total funding available per Lab Cycle.

The Secretariat will identify a shortlist of eligible, high-quality ideas for each stream and interview Proponent representatives as part of the screening process. Regional Panels will refine the shortlist and collaborate with Global Lab Advisors to select the final cohort of vehicles that will move forward in the Lab process to Phase 2.

For the 2026 Cycle, the Regional Panel Pre-Selection Meetings will tentatively take place in mid-February 2026. The Global Selection Meeting, during which the Lab Members will vote to select one finalist from each stream to move forward through the rest of the 2026 Lab Cycle, will tentatively take place in early March 2026.

2.2 PHASE 2: VEHICLE DESIGN [MARCH – MAY]

Phase 2 aims to 'stress-test' and finalize the design and mechanism of the vehicle concept. This goal also involves refining vehicle mechanics, conducting financial modeling, assessing market additionality and developing a Theory of Change.

Phase 2 analysis entails:

- **Identification of the Context Where the Vehicle Would Operate:** identifying its sectoral and geographical scope is a critical preliminary step for defining the vehicle's market test and assessing its catalytic potential in Phase 3.
- **Assessment of the Market Additionality of the Vehicle:** identifying the risks and barriers faced by investors in the markets potentially eligible for the vehicle, highlighting how risks would be addressed, and how the vehicle performs in comparison with similar vehicles. This includes a comparative market analysis (sectoral, geographic, and structural comparatives), a comparative analysis table, and a SWOT analysis.
- **Development of an Investment Thesis and Strategy:** an in-depth mapping of the investment strategy including type of activities, pipeline sourcing, and relevant financial vehicles. This includes an articulation of climate impact objectives and the refinement of the theory of change.
- **Vehicle Mechanics and Financial Modeling:** an in-depth description of how the vehicle would operate – at a concept level – outlining the types of organizations and skill sets required to implement the concept and achieve impact as well as the envisioned cashflows, strategies for managing or transferring risk, and capital flows.
- To perform the analysis, the Lab Secretariat establishes and leads collaborative **Working Groups** consisting of the Proponent(s), Lab Advisors, Regional Panel Members, and external experts from the public, private, and third sectors. To facilitate

a collaborative environment, efforts will be made to limit the size of groups to a maximum of approximately 10-15 individuals with a balance of funders/capital allocators, sectoral/technical experts, financial structuring specialists, and expertise relevant to specific vehicle features.

The activities of the Working Groups involve:

- One introductory conference call at the inception of Phase 2 involving all Working Group members with the aim of (i) presenting the vehicle concept and design, (ii) receiving feedback on the vehicle-specific analytical approach, and (iii) receiving suggestions on experts to be involved in the analyses.
- Bilateral conversations with selected members of the Working Group.
- One conference call towards the end of Phase 3 to validate the analysis, which will be shared via slide deck.

2.3 PHASE 3: IMPLEMENTATION DESIGN AND IMPACT [JUNE – AUGUST]

Following the approval of the vehicle mechanics and other analytical tasks completed in Phase 2, the vehicles will move into the Implementation Design and Impact Phase designed to evolve the Idea from 'talk to action' by building out pilot and implementation strategies. This involves supporting initial market testing of the initiative, defining key milestones, and in-depth modeling to assess financial, social, and climate impact. At the end of Phase 3, an Endorsement Meeting is held, convening Lab Members to review and endorse the final design of the vehicles.

Specifically, Phase 3 analysis entails:

- **Assessment of the Actionability and Development of Implementation Pathway:** an implementation risk assessment identifying key risks (operational, financial, etc.) to Development of an implementation pathway and milestones needed to reach pilot and subsequent implementation. This includes a resource assessment and stakeholder mapping.
- **Development of Fundraising Strategy:** analysis of capital and fundraising needs. Identify relevant investor types and develop a fundraising timeline.
- **Financial Model Finalization:** building out the initial financial model and verifying soundness through external feedback. Develop strategy for crowding in private capital for and circumstances under which it will become commercially viable.
- **“Modelling work” for Impact analysis:** focusing on the boundary of the initial market test for the vehicle, quantitative and qualitative assessment of (1) the impact of the vehicle on specific key barriers addressed in the context of the initial market test for the vehicle (e.g., risk mitigation effect) determined against a status quo or business-as-usual scenario the idea intends to improve upon; (2) the catalytic potential of the vehicle, including the amount of finance needed for setting up the initial market test, the potential catalytic finance mobilization potential and leverage, and estimate of CO₂e emission reductions and, if appropriate, GW deployed. Advance a gender strategy as applicable.

The main communications deliverables produced in Phase 3 include:

- **Vehicle Analysis Report.** The main deliverable from the Lab process, this report is a 10-12-page paper that brings together all analysis and information collected during Phase 2 and 3. The report is produced by Lab Analysts in conjunction with Idea Proponents and is structured around the Lab criteria. It explains how each vehicle is

innovative, financially sustainable, actionable, and catalytic against the status quo. Draft reports are circulated to Lab Members for their input in mid/late August and finalized in early September before the Endorsement Meeting to help inform the endorsement decision. An example of a past vehicle analysis report can be found [here](#).

- **Two-pager vehicle overviews.** Complementary to the vehicle analysis report, the Lab Secretariat also develops a two-page overview of the vehicle with basic information relating to the vehicle. It is usually used for outreach and can be distributed at events. In terms of Lab cycle timing, final drafts of the two-page overviews will be sent to the Lab communications team in early September. The two-page overview from a past vehicle can be found [here](#).
- The Lab Secretariat will provide support and facilitate input to achieving these milestones, ensuring value-added and equal support for each Lab Vehicle. **The Lab itself does not offer direct funding for pilot implementation.** Any eventual provision of funding is achieved on a bilateral basis between public finance institutions or individual Lab Members and pilot implementers. In Phase 3 and continuing into Phase 4, the Lab Secretariat will informally facilitate these processes.

2.4 ENDORSEMENT

At the end of Phase 3, the Lab Secretariat convenes Lab Members to determine whether vehicles should be endorsed. Endorsement is defined as a signal of support by Lab Members that the vehicle is innovative, transformative, and ready to be launched to the wider climate finance community.

At the Global Endorsement Meeting in Quarter 4, Proponents will present the “pitch” for their idea’s final design to Lab Members. Lab Principals, Advisors, and Regional Panel Members (if applicable) convene at this meeting to endorse these final designs, signaling that the Lab vehicles are ready to be launched into the market as official Lab investment vehicles. Lab Members can also offer support, feedback, and, if they choose, expressions of interest for potential investment.

2.5 PHASE 4: ONGOING SUPPORT & MONITORING

During Phase 4, ongoing support for Lab Vehicles post Endorsement falls into two categories 1) Financial Support for Implementation and 2) In-Kind Implementation Support. All endorsed ideas will benefit from in-kind implementation support, whereas only a select number of vehicles will receive financial support through the Pre-Seed Facility. More details can be found below.

2.5.1 IN-KIND IMPLEMENTATION SUPPORT

The Lab Secretariat will provide **30 days** of bespoke launch and analytical support **within the 12 months following endorsement** to support vehicles’ progress towards full implementation. Proponents will choose from a menu of support options based on specific needs. Bespoke support can include (but is not limited to):

Design fine-tuning	<ul style="list-style-type: none"> • Positioning and market research • Mechanics • Financial model
Finance mobilization	<ul style="list-style-type: none"> • Strategy • Investor mapping and profiling • Business case refinement

	<ul style="list-style-type: none"> • Pitch deck development • Pitch book design • Review of funding applications and proposals
Partnerships & Outreach	<ul style="list-style-type: none"> • Investor mapping and profiling • Visibility and communications • Assist introductions, particularly to Lab Member institutions and network
Ongoing donor coordination and grant support	<ul style="list-style-type: none"> • Ensure effective communication with grantors • High-level review of grant applications

Finally, the Secretariat will provide **light-touch support** to Proponents on an ongoing basis following endorsement, which will include:

- **Monitoring to ensure progress towards milestones:** 2 – 3 check-ins per year
- **Lesson sharing & reporting:** Through white papers, webinars, workshops, or blogs

In addition, the Secretariat will monitor and report vehicle progress, maintain contact with implementers, and continue to publicize new updates and announcements under the Lab brand. Permission to use Lab materials and branding will be agreed upon between the Secretariat and vehicle.

2.5.2 PORTFOLIO WEBINARS

Held 2-3 times per year, portfolio webinars will showcase vehicles within similar sectors and geographic scope to targeted audiences. These webinars will also identify funder/investor interest and allow the Lab to support follow-up discussions with individual vehicles.

Targeted Audience: The Portfolio Webinars' main target audience includes:

- Climate, environmental, and social impact funds
- Development finance institutions
- Philanthropic foundations
- Impact investors
- Donor governments
- Media

2.5.3 FINANCIAL SUPPORT THROUGH THE LAB PRE-SEED FACILITY

The Lab Pre-Seed Facility was launched in 2024. The Facility takes an active role in filling capital needs by offering pre-seed funding through conditional grants to a **subset** of endorsed vehicles allowing them to fast-track their implementation.

The Facility is part of the Lab's overall support to vehicles post-endorsement. The Facility offers grant capital (USD 150k-USD 250k) to a select group of high-performing vehicles. Applications are by invitation only, and only Lab Proponents from each current cohort will be invited to apply.

Selections will be based on:

1. **Feasibility:** Existing financial commitments, runway to first close, pipeline development, commercial viability, and extent of stakeholder engagement.
2. **Impact:** Scale of expected impact and potential to replicate to other geographies/sectors.

3. **Grant Additionality:** justification of grant request and soundness of the listed upcoming activities.

After submitting applications, Proponents will be invited to a Due Diligence (DD) process and then there will be an Investment Committee (IC) composed of independent experts.

Selected Vehicles will receive conditional funding. Disbursements will be made upon meeting certain milestones that will be agreed upon in advance of the award.

3. ROLES AND RESPONSIBILITIES

The Lab's governance and membership structure reflects the appetite of current and potential new Members. It supports the continuation of a dynamic network responsive to market conditions, policy signals, global developments, and continuous learning from previous cycles and complementary initiatives. A description of key groups involved in the Lab, their respective roles and time requirements are outlined below.

3.1 THE LAB STEERING GROUP

The Lab's strategic direction is guided and managed by the Lab Steering Group. This group includes representatives from the Lab's funders, who oversee the work of the Secretariat. Their specific roles include:

- Overseeing the work of the Secretariat and setting the strategic direction for the work of the Lab;
- Ensuring process moves according to timeline and that administrative questions are resolved;
- Establishing the implementation details of the Lab's strategic direction, including analytical and communications elements; and
- Committing to ensuring ongoing financial support, including through outreach to other potential funders, to set the basis for sustained impact of the Lab's work.

This group is brought in at key decision points to guide the Lab's progress and the development of ideas, assist them in preparing for implementation, and build partnerships that support the implementation of ideas.

3.2 LAB MEMBERS

[Membership](#) for the Lab consists of Lab Principals and Lab Advisors at the global level and expert Panel Members for all regional programs. As a rule, it is reviewed annually at the end of each Lab Cycle.

3.2.1 LAB PRINCIPALS

Lab Principals are at the CEO, senior executive level, or ministerial level. They provide high-level endorsement of the Lab's objectives and recommendations and commit to providing institutional expertise to the Lab. In addition, Lab Principals support the Lab Secretariat with communication and outreach, act as spokespersons for the Lab process, and endorse vehicles at the conclusion of each annual cycle.

Time requirements for Lab Principals include attendance at one targeted high-level event per analytical cycle, typically the Global Endorsement Meeting in Quarter 4.

3.2.2 LAB ADVISORS

Lab Advisors will contribute institutional expertise to the Lab to support identifying ideas, vehicle design, development, and stress-testing. Each Lab Principal will have at least one Advisor from their institution. The role of Lab Advisors includes:

- Forming a key advisory group to the lab program and Proponent teams, representing Lab Principals at an operational level and during Selection and Endorsement Meetings;
- Ensuring progress on administrative issues and resolving questions on Lab design and procedure;
- Contributing to the development of criteria for the identification of ideas;
- Advising on and challenging the design of vehicles, task and critique of the analytical work;
- Advising on the identification of ideas; and
- Engaging in outreach to source, test, and ultimately promote endorsed vehicles.

Time requirements for Lab Advisors include attendance at three to four meetings after each distinct analytical phase and update calls every six to eight weeks throughout the Lab Cycle. Time required for input and review of analytical work is concentrated in Phase Two but is not envisaged to total an average of more than 8 hours per month over the Lab Cycle.

3.2.3 REGIONAL STREAM PANEL MEMBERS

Regional stream membership consists of Panel Members who, among other roles, share Advisor duties at the local level (see Table 1). The Lab has five regional programs in the 2026 cycle: Brazil, India, Philippines, East and Southern Africa, Latin America and the Caribbean. Regional Panel Members' main responsibilities include:

- Sourcing ideas through networks;
- Recommending the highest quality ideas with the greatest potential for impact from the region and voting on a shortlist of ideas that then goes to the global level.
- Developing vehicles by serving on Working Groups led by the Secretariat and alongside Global Lab Advisors, observers, and other experts;
- Recommending (or not) endorsement; and,
- Supporting vehicles with technical capacity or political support post-endorsement alongside Global Lab Advisors and external groups.

Table 1: Global Advisor and Regional Panel Members' roles throughout the cycle

Phase	Global Advisors and Regional Panel Members
1 (Jan-Feb)	<ul style="list-style-type: none"> • Review longlist of submissions • Convene in-person to vote on submissions • Global Selection Meeting to determine the final cohort
2 (March-May)	<ul style="list-style-type: none"> • Join stream-specific Working Groups • Contribute local market expertise and connections • Advise on vehicle design • Review work conducted during Phase 2 during Mid-Cycle Call
3 (June-Oct)	<ul style="list-style-type: none"> • Advise on vehicle implementation pathway • Review work conducted during Phase 2 & 3 during Pre-Endorsement • Convene in-person and vote to Endorse vehicles at the Endorsement meeting.

- Continue support for partnerships and piloting

3.3 LAB SECRETARIAT AND ANALYTICAL PROVIDER

[Climate Policy Initiative](#) (CPI) acts as the Lab's Secretariat and Analytical provider. The secretariat's structure and operation have added significant value to the Lab process. Lab Members have decided to delegate greater decision-making powers on day-to-day issues to the Secretariat to ensure a timelier process. In addition, commitments to maintaining transparency and openness in the Lab process, as far as practical and reflecting confidentiality issues, are reinforced.

The role of the Secretariat covers several facets, outlined below:

3.3.1 SECRETARIAT SERVICES

Convening

Lab Member calls: CPI will organize and administer Member calls throughout the Lab Cycle, including preparing background and guidance material for the calls and summary notes.

The 2026 Lab Cycle has set a tentative schedule for these meetings, which includes:

- A regional selection meeting for Regional Panel Members for the regional program ideas in early to mid-February (dates TBD).
- A global selection meeting for Global Lab Members in early March (dates TBD).
- Phase 2 outcomes virtual meeting (Q2).
- A technical Advisor Virtual Pre-Endorsement Meeting to review the final Lab cycle analysis and vehicle designs, recommend Endorsement, or call out key concerns. This meeting is held at least one month before the Endorsement meeting (late August or early September 2026).
- A final high-level meeting with Lab Principals and high-level Observers, with the goal of endorsing the final vehicles (Q4 and in-person).

Internal Coordination

The Secretariat will provide ongoing coordination in close interaction with the Lab Steering Group, utilizing the following methods of internal communication:

- Quarterly progress update calls with the Lab Steering Group.
- Email updates to Lab Advisors every six to eight weeks.
- Swift replies to Lab Members' queries by a dedicated staff member.
- Preparation of briefing materials ahead of meetings.

Communications and outreach

The Secretariat will be responsible for:

- Outreach to encourage implementation of pilots, helping implementing entities to establish partnerships and source funding.
- Coordination between the Lab and other relevant initiatives, for instance, by identifying other relevant initiatives as platforms to deliver the Lab's messages and ensuring that the communications plans of other initiatives complement each other.

- Outreach to relevant stakeholders and media to publicize and promote the work of the Lab to maximize its impact.

3.3.2 ANALYTICAL SERVICES

The Secretariat will drive analytical cycles to gather and develop further innovative approaches that unlock private finance at scale in developing countries. The Lab Cycle commences with an international 'call for ideas'.

In addition, the Secretariat, as a part of the continuation of analytical services, will conduct tracking and sharing of lessons learned with the implementation of pilots and work resulting from previous Lab Cycles.

The tracking and sharing of lessons learned would be structured to include:

- Keeping track of the implementation of the Lab vehicles.
- Targeted convening of pilot partners to share experiences and learning.
- Sharing lessons learned via various media (including targeted publications, webinars, or workshops).
- Providing support in summarizing and sharing in-depth evaluations, which will be conducted and financed through individual projects.

3.4 LAB EXPERTS AND WORKING GROUPS

The Secretariat will conduct the analytical work of the Lab Cycle in consultation with vehicle-specific Working Groups, experts, and/or other analytical organizations.

Working Groups include:

- The Proponents of the selected Ideas.
- Lab Advisors.
- Regional Panel Members.
- External experts and/or other analytical organizations.

Lab Advisors and Regional Panel Members will self-nominate their participation in Working Groups. The Lab also relies on its network to nominate and engage independent experts and organizations, including non-formal Lab Members or Observers, to join Working Groups as necessary. The engagement of external experts and/or other external organizations is aimed at utilizing their specific technical skills and thematic or geographic expertise to evaluate vehicles, and it will be based on requirements and recommendations.

Working Groups are expected to inform more detailed analysis and provide guidance and review. Time requirements for Working Group members include participation in periodic guidance and review calls approximately every six weeks during each analytical phase, and occasional bilateral calls with the Lab analysts. The estimated time required for involvement in working groups is four hours per month (per vehicle) over the Lab cycle between March and August. The Secretariat will outline specific milestones for each Working Group, which will be shared in separate work plans.

3.5 IDEA PROPONENTS AND IMPLEMENTING ENTITIES

3.5.1 IDEA PROPONENTS

In submitting an idea to the Lab for consideration, Idea Proponents are signaling a significant commitment of time and resources to the process of developing promising ideas for implementation-ready projects over nine months, with further expectations of lesser engagement after this initial period. The Lab expects Proponents of shortlisted ideas to work

closely with the Lab Secretariat to help inform the deeper analysis throughout the Lab Cycle.

Idea Proponents, in turn, will benefit from the in-depth analysis provided by the Lab, including input and guidance from a wide range of high-level public and private experts, exposure to prominent public and private sector investors, analytical support from the Lab Secretariat equivalent to approximately USD 150,000 – USD 200,000 per idea as well as robust marketing and communications support throughout the Lab Cycle. In addition, the Secretariat will provide bespoke launch and analytical support in the 12- months following the conclusion of the Lab Cycle, and light-touch support through the Lab network on a continual basis for the implementation teams of endorsed vehicles.

3.5.2 IMPLEMENTING ENTITIES

Implementing Entities are any organization taking the concept design and developing it for pilot or replication at scale. These entities may be the Idea Proponent, or they could be a separate entity. If Idea Proponents do not have the means or the inclination to develop pilot proposals, the Lab Secretariat has the power to suggest and enlist potential implementers willing to develop them from within or outside the Lab. In some cases, several interested implementing entities could support a single vehicle. For Proponents who do not have the capacity to implement the idea, the Lab will seek to identify a suitable implementation partner during the course of Phase 3.

It is recognized that to realize pilots of Lab Vehicles at the end of the Lab process, a significant amount of preparation and decision-making in Phase 3 needs to be aligned with the interests of the Implementing Entity rather than the collaborative group of Lab Members. These include eventual decisions on target markets, human resources and governance setups, budgeting, and in-house skills and capacities to be recruited. These decisions are taken in dialogue with potential funders.

3.6 DONORS AND INVESTORS

Donors and Investors may be from within the Lab Membership group or external contacts.

For Donors and Investors from within the Lab Membership group, the Lab Secretariat will seek details of the potential support that could be provided to Implementing Entities, both in terms of financial or in-kind expertise support.

Details for available funding windows for the market testing of selected vehicles will also be requested, including the requirements relating to relevant public procurement regulations.

The Lab itself does not guarantee funding for the implementation of vehicles. Any eventual provision of funding is achieved on a bilateral basis between finance institutions or individual Lab Members and Proponents/implementation partners. Beginning in Phase 3, and through the ongoing support process in Phase 4, the Lab Secretariat will work to facilitate these processes.

4. PRINCIPLES OF ENGAGEMENT AND INTELLECTUAL PROPERTY

In submitting an idea to the Lab, the Principles of Engagement outlined below are understood and agreed to. The purpose of these principles is to clarify expectations related to (1) the use of information and ideas submitted to the Lab by Proponents, members and external experts and, which is provided to develop selected ideas and vehicle pilots, and (2) the future use of vehicles developed by the Lab's analytical providers in conjunction with

Lab Members, Proponents, and external experts. It includes all information provided to the Lab, whether conveyed through written comments, in soft or hard copy documents, or verbally at meetings.

The work of the Lab and participation in it is based on the following understanding:

- The Lab is a non-proprietary, knowledge-sharing initiative. By submitting information and ideas to the Lab, Proponents, members, and external experts agree that the ideas, information, and associated analysis may be used freely, developed, published, and modified by the Lab and by third parties.
- As a nonprofit organization, the Lab Secretariat Climate Policy Initiative (CPI) will ensure that Lab vehicle designs, research reports, and other general Lab materials are available on CPI's website for the consumption and benefit of the general public.
- However, as Lab ideas move toward launch, CPI will work with Idea Proponents and implementation bodies to safeguard confidential information.
- The Lab will publish information on its website about vehicle analysis and decisions taken transparently and in a timely way. In particular:
 - A current list of Lab Members will be maintained.
 - Agendas and summaries of Lab Meetings and all decisions will be made available.
 - The results of Lab analysis will be published upon completion of Phase 3 of each Lab cycle.
- All Lab Members, Working Group members, and analytical providers, will serve in expert, objective capacities. The Lab analysis will be objective and neutral between vehicles.
- It is not incumbent on analytical providers to accept all or any views shared as part of ongoing analysis.
- Decisions taken by the Lab Steering Group and Lab Members regarding processes, including voting procedures to progress vehicles to more advanced analytical phases, are final.
- The Lab will facilitate fundraising for endorsed ideas, but in no way guarantees funding.
- While the Lab will offer support as highlighted in paragraph 2 of this document, once endorsed the implementing entity (and/or the Proponent) will be chiefly responsible for driving the pilot development and fundraising for the endorsed idea.
- The Lab will support pilots by Proponents as well as other appropriate implementation partners.
- These principles for engagement will be made available on the Lab website.

5. EXTERNAL COMMUNICATIONS

The Lab's Secretariat is responsible for coordinating and approving the Lab's external communications. This work includes setting a communications strategy and plan that covers communications goals, activities, and a timeline for engagement. The plan is developed and changed as needed with the support and advice of the Lab's funder group and membership.

5.1. EXTERNAL COMMUNICATIONS GOALS

In general, the Lab has several external communications goals:

- Grow relationships with governments, institutional investors, investment banks, project developers and development finance institutions and complementary initiatives. The Lab's success depends on its ability to empower decision-makers to agree on, fund, and implement high-quality climate finance solutions.
- Solicit ideas from the broader climate and development community to feed into the Lab. As demonstrated in previous cycles, the quality of ideas—and commitment to these ideas by idea Proponents and Lab Members—is paramount to the Lab's ability to develop them and eventually see them change the world.
- Promote vehicles on their path to implementation. The Lab can help amplify the successes of its launched vehicles, growing the network for those vehicles and supporting them as they move forward.
- Influence the climate finance conversation by demonstrating real solutions that work on the ground, and share these solutions with the broader sustainable development community in accordance with the aims set out in the Paris Agreement and Sustainable Development Goals.

5.2. EXTERNAL COMMUNICATIONS ACTIVITIES

In keeping with these goals, external communications activities under the Secretariat's responsibility include compiling professional outputs from analytical work, providing email updates and website maintenance, coordinating presence at events, and engaging in outreach to media. In many cases, these activities will also require the support and engagement of Lab Members and their respective institutions, particularly members of the Steering Group.

5.3. USE OF THE LAB'S LOGO AND MATERIALS

Any external use of the Lab's logo or the 'Endorsed by the Lab' logo must be approved by the Lab Secretariat.

The Lab welcomes using its analytical reports and resources for noncommercial purposes, such as policy discussions or educational activities, under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 Unported License. The Lab Secretariat must approve any commercial use of its materials.