

MAINSTREAMING SCALING INITIATIVE CASE STUDIES

*The Standards and Trade Development
Facility (STDF)*

Charlotte Coogan
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 **SCALING**
COMMUNITY OF PRACTICE

MAINSTREAMING SCALING

A Case Study of the Standards and Trade Development Facility (STDF)

by

Charlotte Coogan

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A Case Study for the Initiative on
Mainstreaming Scaling in Funder Organizations

For the Scaling Community of Practice

www.scalingcommunityofpractice.com

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Preface & Acknowledgements

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The findings, interpretations and conclusions expressed in this document are entirely those of the author. They do not necessarily represent the view of the STDF or any of its partner agencies or donors.

More information on the STDF is available on the STDF website at www.standardsfacility.org



Executive summary

The Standards and Trade Development Facility (STDF) is a global partnership that promotes improved food safety and animal and plant health in developing countries. STDF helps developing countries **meet sanitary and phytosanitary (SPS) requirements for imports and exports**, based on international standards. It acts through three interlinked workstreams — Global Platform, Knowledge Work, and the Grant Mechanism — to catalyse change by convening, innovating, and learning for effective SPS practices. STDF is supported by donor contributions from Australia, Canada, European Union, Finland, France, Germany, Ireland, Norway, Sweden, the Netherlands, and the United States.

This report explores what it would mean for the STDF to engage with scaling more intentionally (i.e. to mainstream scaling). It addresses: what the partnership is already doing that supports uptake and influence, where gaps or missed opportunities exist, and what strategic and operational adjustments could increase its ability to operate more effectively at scale.

How scaling works across the workstreams

The STDF already is doing a lot of scaling work, reflecting its focus on catalysing, even if it has not historically been framed as "scaling". The STDF's 2025-2030 Strategy now gives it a strong, explicit scaling mandate. Through this report and other ongoing efforts, STDF is now identifying how it will operationalize scaling for improved results and reach.

Grant Mechanism: Demand-driven projects and project preparation grants already contain processes supportive of scaling, including co-financing requirements and multi-stakeholder alignment. Scalability is discussed during grant review processes, but there is not a common understanding of what this means in practice. Explicit scaling pathways and post-grant handoffs could improve scaling outcomes.

Knowledge Work: Tools and guidance are designed for adaptation and adoption across developing countries and targeted dissemination activities occur. However, knowledge products or guidance on how to scale could improve scaling outcomes.

Global Platform: The STDF's convening power creates the space for networking and partnership to scale, but it does not consistently use its influence to facilitate strategic handoff for scale. Systematic follow-up on identified synergies and handoff opportunities could improve scaling outcomes.

Enablers and characteristics of mainstreaming scaling

The Scaling Community of Practice's [Mainstreaming Tracker Tool](#) was used to organize the analysis on how scaling has been mainstreamed within the STDF.¹

Vision, goals, and strategy: The STDF's vision, goals, and strategy are aligned with scaling goals. Since 2015 (and with increased focus since 2020), the STDF positioned itself as a catalyst of change and safe trade facilitation. Further clarity about the extent to which it focuses on generating knowledge for others to act on through improved practices vs. directly implementing projects that improve outcomes could improve scaling outcomes.

¹Dimensions related to leadership; decentralizations and localization; optimal scale, equity, and inclusions; and mechanisms for tracking mainstreaming goals are included in the tracker and were considered in the full report but are not summarized in the Executive Summary as they were determined to be somewhat less relevant to the STDF's specific experience.



Definition of and common language for scaling: There is no common definition of scaling within the STDF. However, terms like sustainability and spillovers are well understood, widely used, and capture many concepts related to scaling. A common understanding of scaling could make consistent prioritization of scaling easier and improve scaling outcomes. The STDF may wish to consider the following definition of scaling: *facilitating the adoption, expansion, and sustainability of successful SPS solutions so that they meaningfully reduce unsafe trade beyond the STDF Secretariat's direct support.*

Culture, incentives, and measures of success: The STDF's prioritization of collaborative support and trust-building are likely to lay a strong foundation for partnership-based scaling. However, there is a widespread view that, because scaling relies heavily on external stakeholders, scaling is outside the control of the STDF Working Group and Secretariat. Furthermore, many believe that, if everything cannot be scaled, it should not be prioritized. However, these arguments do not necessarily mean that scaling should not be prioritized at all, only that it should be rationally prioritized. Incentives for staff, grantees, and Working Group members to support scaling, supported by defined measures of success, could provide clarity about how scaling can be rationally prioritized, induce a cultural shift, and improve scaling outcomes.

Partnership and intermediary function: Because the STDF is a catalytic partnership, the partnership and intermediary function is the STDF's strongest asset in supporting scaling. Much of the STDF's work, particularly its Global Platform, create the space for networking and intermediation, which support scaling and handoff. However, there is a widespread assumption among some within the partnership that successful projects will scale themselves. The STDF could actively use its influence and connections to facilitate and manage transition processes to improve scaling outcomes.

Instruments, policies, and processes: While several previous STDF strategies addressed STDF's "catalysing" role, scaling has not been a historical goal of the STDF and the STDF has not developed dedicated policies or processes to support scaling. However, this does not mean that its policies and processes do not support scaling. STDF Knowledge Work can support scaling by being intentionally designed for easy adaptation and adoption across low-resource contexts. Its Global Platform supports the dissemination of good practices, which can enable vertical scaling. The demand driven nature of STDF Grant Mechanism is often viewed as a barrier to selection for scaling; however, scalability could be used as an assessment criteria and the STDF could engage in late-stage co-design for scaling to improve scaling outcomes.

Dedicated resources for scaling: The STDF is starting to dedicate resources for scaling; largely in the context of innovation and scaling activities. This case study also represents a key investment in scaling for the STDF. Nonetheless, scaling will likely need to be resourced and specifically integrated into the annual STDF workplan (approved by the Working Group), as well as workplans of the STDF Secretariat, including project managers, to improve scaling outcomes.

Analytical frameworks, tools, and knowledge: Although the STDF's Knowledge Work is designed for scaling, the STDF does not have specific frameworks and tools to facilitate scaling. It could create guides for grantees or project managers on designing for scale or scalability assessments to improve scaling outcomes ([Appendix 2](#)).

Integration into monitoring, evaluation, and learning: The STDF already has many indicators for scaling in its MEL framework. Its systematic data collection from grantees gives it the opportunity to conduct cross-project analysis to determine the types of projects that get scaled. Collecting data over much longer timeframes (10+ years) could provide the necessary information to fully capture the scaling journey of its projects and allow for evidence-based decision-making about the types of grants that will scale to improve scaling outcomes.



Constraints, challenges, and opportunities

The STDF's efforts to mainstream scaling may be constrained by its *ad hoc* approach to scaling, lack of a common language, dependency on internal and external stakeholders, small Secretariat, limited resources, decentralized governance structure, and lack of current capacity to assess scaling and scalability. These constraints do not mean that the STDF cannot prioritize scaling, only that it will need to mitigate these constraints or develop strategies that function within them. In doing so, the STDF will need to manage its institutional capacity and incentives, interactions with its Working Group for scaling and handoff, MEL, and engagement with the external environment

A number specific change opportunities were identified for the STDF as outlined below. These include both incremental and transformative opportunities for the short, medium and longer term. More details are provided in a Table at the end of the executive summary.

Define “scaling” and use the definition end-to-end. Adopt an internally owned definition that distinguishes scaling from sustainability and set expectations for horizontal, vertical, and deepening scaling. Embed the definition across concept notes, review criteria, closeout, and MEL to facilitate discussions about STDF's priorities.

Resource the partnership and intermediation function. Make brokering, alignment, and handoff a deliberate STDF role. Specify process, assign responsibility, and formalize partner pathways for post-grant uptake.

Turn the Working Group into a systematic handoff engine. Ask members to assess alignment with their programmes at approval and to lead specific post-grant actions on a volunteer basis based on mutual benefit. Track handoffs (who, what, by when) and use closeout sessions to name and empower a “scale sponsor.”

Move partner engagement earlier. Start donor and implementer engagement during implementation, not at closeout. Pilot a light, time-bound bridge (6–12 months) to support a post-grant champion for a small number of high-potential projects.

Grant application process and implementation for “fit to scale.” Add screening criteria based on supply-chain relevance, donor fit, beneficiary credibility, and communications, which were perceived to drive scalability of projects within the STDF. However, do not adopt rigid expectations that all grants meet these criteria; set attainable targets. Engage in late-stage co-design to increase the scalability of promising projects. Use project preparation grants and mid-term reviews to de-risk scale-pathways.

Update MEL to track uptake, not just outputs. Define a small set of comparable scale indicators (e.g., adoption/replication, institutional embedding, follow-on finance) and configure monitoring processes to aggregate them. Develop a simple post-grant repository to record uptake, financing, and policy effects.

Align culture and incentives. Make scaling someone's job. Clarify Secretariat, Working Group, and grantee roles. Integrate dedicated action for handoffs into project manager workplans and set realistic expectations for scaling. Reward learning and credible handoffs, not just completion.



Summary of identified change opportunities

Opportunity	Work stream	Stakeholder	Timeframe	Ease of implementation	Impact on mainstreaming
Incremental change opportunities					
Continue knowledge management efforts to improve accessibility and address challenges stakeholders face in finding existing Knowledge Work outputs.	Knowledge Work	Secretariat	Short-term	Easy	Minor
Implementing partners leverage their own networks to facilitate the transition to scale.	Grant Mechanism	Implementing partners	Short-term	Easy	Minor to Moderate
Develop STDF's own definition of scaling and specify the extent of its ambition and expectations for internal and external stakeholders.	Crosscutting	Secretariat, with input from Working Group	Short-term	Easy	Moderate
Use consistent terminology for projects/pilots and apply the four characteristics ² of scalable projects to prioritize funding.	Grant Mechanism	Secretariat, Working Group	Short-term	Easy	Moderate
Integrate transformational scaling indicators into the new Monitoring, Evaluation, and Learning (MEL) framework.	Crosscutting	Secretariat, with input from Working Group	Short-term	Moderate	Moderate
Working Group members proactively identify and advocate for projects their organization would be interested in scaling; ensure systematic follow-up on identified synergies by the Secretariat.	Grant Mechanism, Global Platform	Working Group, Secretariat	Medium-term	Moderate	Moderate
Grantees use some of their budget for continuous donor engagement throughout the project lifecycle.	Grant Mechanism	Grantees, with support from	Medium-term	Moderate	Moderate

² See [Scaling across STDF Projects](#):

1. Activities need to be innovative and successful to scale. However, projects that are too innovative might take a long time to establish additional buy-in and be difficult to scale.
2. Activities should be relevant to local supply chains, support existing exports, and solve local problems. Activities that try to develop new supply chains or exports might experience additional challenges to scale.
3. Activities should align with donor priorities, either supporting value chains that have been prioritized by donor's development support strategies or addressing specific SPS concerns of donors.
4. Beneficiaries need to be effective and advocate for themselves to build on achievements after the initial grant period.



		Secretariat and Working Group			
Invest in developing scaling guidance for both grantees and staff, including tools to design projects for scale and resources for staff capacity building in scaling strategy.	Crosscutting	Secretariat	Medium-term	Moderate	Moderate
Leverage existing data for cross-project comparisons and follow projects over longer timeframes to identify characteristics of projects that tend to scale.	Grant Mechanism	Secretariat	Medium-term	Moderate	Moderate
Explore impact evaluation approaches assess STDF's impact at scale.	Grant Mechanism	Secretariat	Medium-term	Moderate	Moderate
Specify which types of grants and activities should be designed for scale and clearly articulate reasons for pursuing activities unlikely to scale.	Crosscutting	Secretariat, Working Group	Medium-term	Moderate	Moderate
Transformational change opportunities					
Set realistic targets for the percentage of project grants and Knowledge Work outputs designed to scale, and the percentage that ultimately achieve scale.	Grant Mechanism, Knowledge Work	Working Group	Medium-term	Easy	Significant
Invest in staff training and time to support scaling.	Crosscutting	Secretariat	Medium-term	Moderate	Significant
Consider dedicated funding for the transition to scale.	Grant Mechanism	Working Group	Medium-term	Difficult	Significant
Formalize the intermediary role by creating partnerships with implementing organizations for matchmaking, hiring external consultants, or identifying dedicated STDF staff. This requires dedicated funding.	Crosscutting	Secretariat, with input from Working Group	Long-term	Difficult	Significant
Adopt a formal expectation that Working Group members consider integrating successful pilots into their programmes, particularly for projects they advocated for.	Grant Mechanism	Working Group	Long-term	Difficult	Significant



Scaling definitions

Horizontal scaling: Scaling to new locations, places, populations, and institutions. Often referred to as replication; however, horizontal scaling can also be adaptive.

Intermediary: An entity that bridges the gap between innovation and large-scale adoption, facilitating connections between innovators, implementers, funders, and national systems.

Mainstreaming scaling: The deliberate and systematic integration of a focus on achieving sustainable impact at scale across all facets of an organization's operations and work streams.

Scale: Sustainable impact that addresses a significant share of the global, regional, or national problem.

Scaling: A process of achieving sustainable impact that meaningfully addresses a significant share of the global, regional, or national problem.

Scaling Deep: Changing underlying values, behaviours, relationships, to ensure meaningful, lasting impact.

Sustainability: The ability of an activity to continue to improve outcomes after the grant period ends.

Transition to scale: After approaches have been proven successful in limited contexts, they need to undergo a targeted refinement and investment process to prepare for broader uptake. This often involves establishing additional partnerships, securing more funding, and modifying approaches to be more versatile.

Vertical scaling: Embedding in and changing large scale (often national) systems, e.g. policy reform, changes to the policy enabling environment, or market systems. Vertical scaling can also refer to institutionalization.

Acronyms

CABI	Centre for Agriculture and Bioscience International
CODEX	Codex Alimentarius Commission
FAO	Food and Agriculture Organization of the United Nations
AU-IAPSC	African Union Inter-African Phytosanitary Council
IPPC	International Plant Protection Convention
KEPHIS	Kenya Plant Health Inspectorate Services
LDCs	Least developed countries
LMICs	Lower middle-income countries
MEL	Monitoring, evaluation, and learning
SPS	Sanitary and phytosanitary
SCoP	Scaling Community of Practice
SADC	Southern African Development Community
STDF	Standards and Trade Development Facility
UMICs	Upper middle-income countries
WHO	World Health Organization
WOAH	World Organisation for Animal Health
WTO	World Trade Organization



Introduction

Across the development sector, there is a growing consensus that one-off, small, well-executed projects are not sufficient to meet the needs of international development. **Solving complex global, regional, or national problems requires development actors to think and operate at scale.**³ The challenge is not simply how to innovate, but how to enable effective solutions to spread, embed, and endure. In this context, [scaling](#)⁴ has shifted from a technical consideration to a strategic imperative.

The [Scaling Community of Practice](#) (SCoP) facilitates knowledge exchange among practitioners for scaling, develops standards and knowledge products for scaling, and supports organizations adopting a scaling mindset. It champions the concept of [mainstreaming scaling](#) — embedding the capacity and commitment to scale into institutional operations. Rather than treating scaling as the responsibility of individual grantees or isolated champions, mainstreaming is the **deliberate and systematic focus on achieving sustainable impact at scale** across all facets of an organization's operations and work streams. This report is part of a broader series of SCoP-supported [case studies](#) that examine how different groups mainstream scaling in practice.

One of the most consistent findings across the SCoP's work is that **scaling rarely happens by accident.**¹ When successful innovations scale, it is often because an institution deliberately created enabling conditions through its project or grant design criteria, its approach to partnerships, its use of data, or the expectations it sets for staff and grantees. However, many organizations that aspire to achieve impact at scale have not yet translated that aspiration into internal systems. As a result, scaling approaches often remain informal, inconsistent, and dependent on individual initiative rather than institutional intent.

Given the recent publication of the Standards and Trade Development Facility (STDF)'s Strategy 2025-2030,² which repeatedly references scaling, the STDF case study offers a timely and instructive perspective on scaling. With a mandate to **support safe trade facilitation through improved and sustained sanitary and phytosanitary (SPS) of public and private sector stakeholders and a long-standing role in piloting and disseminating promising approaches, the STDF already operates at scale in many ways.** It achieves outsized results for its budget, partially because of its focus on influence and catalysing change as opposed to [being](#) the change.³ Before the publication of the new strategy, the STDF did so without explicitly framing its contribution as scaling or building mechanisms to systematically enable scaling. However, the STDF is now considering how to better approach and operationalize scaling for greater results and impacts.

This report explores what it would mean for the STDF to engage with scaling more intentionally: what the partnership is already doing that supports uptake and influence, where gaps or missed opportunities exist, and what strategic and operational adjustments could increase its ability to operate more effectively at scale. The goal is not to critique past choices, many of which reflect deliberate priorities in a different strategic context, nor to increase staff size or resources, but to offer insight into opportunities that could respond to scaling as a specific objective. Because the STDF has not historically framed its work around scaling, **identified gaps should not be viewed as shortcomings, but as entry points for scaling impact.** The analysis is meant to support learning and inform decision-making if the STDF chooses to deepen its engagement with scaling. In doing so, it contributes to a broader conversation about how catalytic groups with limited resources can support long-term, scalable impact.

³ Operating at scale requires addressing a significant share of a global, regional, or national problem and not simply affecting a large number of people. Reaching 10 million people may seem like it is operating at scale, but if the problem being addressed affects several billion people, 10 million people represent a small share of the total need.

⁴ A process of achieving sustainable impact that meaningfully addresses a significant share of the problem.



Background on the STDF

The STDF is a global partnership that promotes improved food safety and animal and plant health in developing countries. This helps developing countries **meet sanitary and phytosanitary (SPS) requirements for imports and exports**, based on international standards. Meeting these standards is necessary for participation in international agricultural trade.

The partnership was founded by the Food and Agriculture Organization (FAO), World Bank, World Health Organization (WHO), World Organisation for Animal Health (WOAH), and the World Trade Organization (WTO).² It also includes representatives from the Secretariats of the Codex Alimentarius Commission (CODEX) and the International Plant Protection Convention (IPPC), as well as donor representatives, selected developing country experts, and other international, regional, and private sector organizations involved in SPS capacity development.

The STDF is composed of three main groups: the Policy Committee, the Working Group, and the Secretariat.² The **Policy Committee** is the governing and oversight body. It approved the recently updated 2025-2030 Strategy, which repeatedly references scaling. Through the Policy Committee, high-level representatives of STDF's founding partners, donors, and developing country experts decide on STDF policy and strategy. The **Working Group** is composed of technical representatives of the STDF's founding partners, donors, developing country experts, and the Secretariats of the CODEX and IPPC, as well as other organizations. The Working Group approves the STDF's workplan, decides which knowledge work and grants to pursue, oversees and contributes to ongoing STDF work on knowledge topics, and guides the allocation of resources. It also serves as a platform for knowledge exchange and learning among members. Finally, the **Secretariat** is housed within the WTO and delivers the STDF workplan. While the Policy Committee and Working Group are composed of people from other organizations (and the WTO) supporting the STDF as a small part of their workplans, the Secretariat has nine fulltime staff and one or two temporary employees, such as interns and young professionals.

The STDF has three integrated workstreams: the Global Platform, Knowledge Work, and Grant Mechanism.³ Workstreams are not distinct or siloed and most activities function across the workstreams. In its most limited sense, the Global Platform is the STDF's Working Group and Practitioner Groups. However, it is often conceptualized as the full network that enables and facilitates the dissemination of STDF good practices to influence the work of other stakeholders. In this context, it includes all networking, dissemination, and influencing work conducted by the STDF. The STDF manages various sector, thematic, and regional learning groups and networks. The Global Platform promotes a coherent approach to collaboration on safe trade and SPS capacity development.

Through the STDF's **Knowledge Work**, the STDF creates tools, resources, and guidance to support SPS capacity development and safe trade facilitation. These include information to support public-private partnerships, SPS capacity development prioritization, digital tools, and good regulatory practices. The STDF prioritizes Knowledge Work related to gender and the environment. Knowledge Work emphasizes dissemination through the Global Platform.

Finally, the STDF has a **Grant Mechanism** to bring together public, private, and other actors at the global, regional, and national levels to pilot innovative and collaborative approaches, leverage expertise, and deliver results for SPS capacity building and safe trade facilitation. Grants are demand driven; calls for specific types of applications are not conducted. The Secretariat reviews grants on a rolling basis and brings them for review by the Working Group twice a year. The STDF supports an average of six project grants per year with up to USD 1 million and six project preparation grants with up to USD 50,000 per grant. Project grants are generally three years, but project preparation grants are limited to about one year. Recipients of project grants must provide matching monetary or in-kind contributions on a sliding



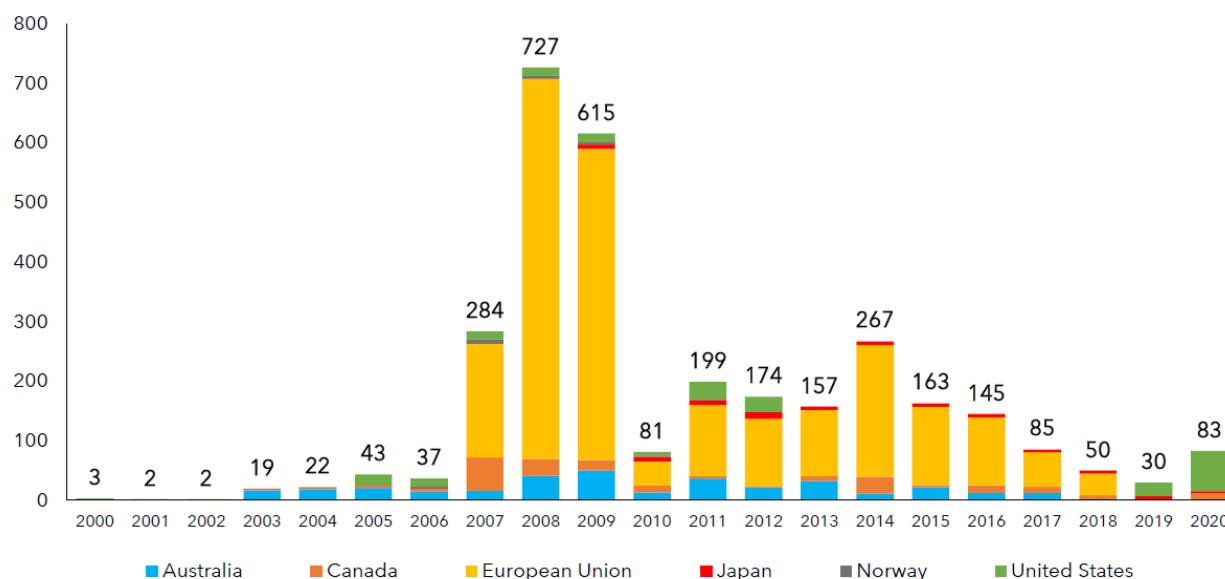
scale based on the development status of their country. They are also encouraged to mobilize additional external funding.

As a partnership and networking group, the STDF also formally acknowledges other members as part of its structure.³ These include other United Nations agencies, inter-governmental organizations, regional organizations, and the private sector. Through its Global Platform function, the STDF's various learning groups and networks inform the STDF's strategic and programming decisions.

History of scaling

At its core, **the STDF⁵ is a scaling partnership**: it aims to “catalyse change” to facilitate safe trade to regional and global markets, that aligns to the international standards for food safety (Codex), animal health (WOAH), and plant health (IPPC) SPS standards recognized in the WTO SPS Agreement. Despite not taking a systematic approach to scaling in the past, the STDF has been a *de facto* scaling champion. For the most part, it does not try to fund or implement transformative change itself. The partnership has correctly concluded that its limited budget prevents it from being able to fundamentally change global trade structures on its own. Based on reporting to the WTO SPS Committee, the STDF's annual budget over the last 20 years has been relatively insignificant compared to funding provided bilaterally for SPS technical assistance.

Figure 1: Bilateral SPS technical assistance (in USD millions)⁶



Notes: SPS technical assistance reported in GEN documents to the SPS Committee by WTO Members from 2000 to 2020. Values have been converted to USD and deflated according to the base year of 2020.

⁵ When referring to the STDF, this report means the entire partnership: the Secretariat, Working Group (including founding partners, donors, developing country experts, and other members), Policy Committee, grantees and implementing organizations, and even other key stakeholders without formal positions.

⁶ See STDF [presentation](#) delivered during STDF/Thematic Group 5 Workshop for the WTO MC-12 SPS Declaration (March 2023)



In light of this, the STDF focuses on providing tools and supporting capacity building for developing countries to change their own trade dynamics. The STDF has positioned itself to work in the central portion of the scaling pathway (Figure 1). This pathway outlines how innovations generally start as **ideas**, which must undergo extensive **research and development** before being **proven** to work at a small scale. These proven technologies then undergo a **transition** process with targeted refinement and investment to make them appropriate for **scaling** before they can operate at a **sustainable scale**.

The STDF generally supports country governments, and to a lesser extent private sector actors, with proof-of-concept pilots and knowledge pieces. However, some of the STDF's Grants and Knowledge Work include a limited amount of research and development, and it passively supports the [transition to scale](#)⁷ through its Global Platform. Targeted support for handoff to the next funder and capacity building for scaling are limited.

Figure 2: STDF's position on the pathway to scale.



Notes: Pathway to scale figure was adapted from IDIA.⁴

The term “scaling” has been somewhat familiar to the STDF Secretariat and Working Group members for years as part of the general dialogue in international development. However, it is **unclear how long the STDF itself has been thinking about scaling**. Some interview participants claimed that the partnership has always thought about scaling and others believed scaling was a new topic. This confusion is likely rooted in the lack of a common understanding of scaling and the STDF's longstanding focus on sustainability, catalysing change, and spillover effects⁸ on other organizations. All these concepts include components of scaling. Some interview participants seemed to consider the STDF's focus on these to reflect a focus on scaling, while others did not.

“In many ways, the STDF is a huge juggernaut of scaling, with the partnership work in the different workstreams”⁹

Interviewer: “Where is this discussion of scaling coming from?”

Respondent: “No idea”

While the STDF has often facilitated scaling outcomes, **references to scaling in partnership documents have historically been limited**. Before the new Strategy, scaling appeared occasionally in annual reports and in the Monitoring, Evaluation, and Learning (MEL) framework, but was not a priority. Nonetheless,

⁷ After approaches have been proven successful in limited contexts, they need to undergo a targeted refinement and investment process to prepare for broader uptake. This often involves establishing additional partnerships, securing more funding, and modifying approaches to be more versatile.

⁸ The STDF considers intentional and unintentional uptake or replication of a project or approach by another group to be a spillover effect of their work.

⁹ Unless otherwise indicated, quotes presented in italics and indented are drawn from interviews and illustrate the points in the preceding paragraph.



scaling activities emerged organically due to other organizational priorities. Much of the STDF's work focuses on [vertical scaling](#), embedding new approaches into national or international system, as opposed to [horizontal scaling](#), replicating new approaches in different areas; although, it supports both.

The 2024 external evaluation⁵ marked a turning point. It concluded that the STDF achieves results and influence beyond what would typically be expected for its modest budget and that **scaling was a key enabler** of this outsized impact. Donors and Working Group members viewed this finding as a key point of leverage for the next strategy.

"Key enablers include the network and the role of the developing country experts especially; the ability to pilot and successfully [scale up](#) innovative approaches; the capacity to broadcast and promote uptake of knowledge products; and the established programme management capacity to support and oversee the delivery of a sizeable portfolio of technically challenging projects across the world. The barriers to achieving the programmatic objectives relate to the scale of STDF, the demand-driven nature of project development, and the capacity of STDF to deliver outreach."⁵

These findings motivated the STDF's current engagement with scaling. Scaling now appears repeatedly in the 2025-2030 strategy³ and the 2025 workplan. However, the **partnership is still determining if, and how, it wants to institutionalize and operationalize its commitment to scaling**. The STDF could choose to leave scaling as a general principle or move along a continuum towards a formal, mainstreamed approach that shapes its processes, measurement systems, and institutional culture. This case study will serve as one input into that decision.

Methods

This case study relied predominantly on publicly available documents provided by the STDF Secretariat outlining their current and historical approaches, policies, practices, and projects and interviews with a selected set of key stakeholders. The STDF provided **32 documents** to review ([Appendix table A1](#)). These documents broadly related to STDF grant processes, STDF published results and evaluations, STDF Knowledge Work, and STDF strategy and operational approaches. Between June 23rd and August 12th 2025, **14 interviews** were conducted. Several interviews included multiple participants, resulting in a total of 22 people being interviewed. The researcher also attended the June 2025 Working Group meeting as an observer to understand the group's dynamics.

Interview transcripts, interview notes, and documents prioritized for detailed document review were coded in qualitative software ([Appendix 1](#)). During coding, notes were also kept in an online document shared with the STDF Secretariat and senior experts within the SCoP. They gave feedback on interim findings, suggested additional areas of inquiry, offered clarifications, and provided interpretive insights. Notes and the coded dataset were then reviewed and synthesized narratively for this report. Responses were anonymized to encourage sharing of differing perspectives.

The **remainder of the report** presents how scaling works across the STDF's workstreams and analyses the STDF's approach to mainstreaming scaling based on the SCoP's Mainstreaming Tracker Tool.⁶ After the main analysis, a section is dedicated to the consideration of constraints, challenges, and opportunities for the STDF. This includes a set of concrete change opportunities for the STDF, should the Working Group decide to mainstream scaling. Change opportunities are purposefully split into incremental change opportunities and transformational change opportunities to differentiate between those that could be taken without significantly changing the partnership and more fundamental change



opportunities which might be more difficult to achieve but have broader effects. The report closes with lessons that could be applied to the broader community of international development actors.

Scaling across STDF's workstreams

All three of the STDF's workstreams include operational elements that support scaling, as well as those that limit scaling. These operational elements affect the STDF's potential opportunities to mainstream scaling.

The **Grant Mechanism** funds demand-driven projects that reflect national interests. However, the depth of this demand and country ownership is variable. To increase ownership and ensure support, all grants require mandatory co-financing from the grant recipient.¹⁰ Although the grant application process does not include a specific question on scaling, it includes questions that are directly related to scaling. These include questions about:

1. How the project addresses regional challenges.
2. The involvement of other stakeholders in the development of the grant, with specific probes related to government involvement and the need for all relevant ministries to provide support.
3. The availability of funding from other sources, including whether funding from other sources was sought
4. Complementarity with other projects both within and outside the STDF.

Project preparation grants are designed to support scaling and align with emerging best practices in the scaling field. These grants can be used to support project feasibility studies, the development of high-quality proposals for STDF funding or other funding sources, or the systematic prioritization of SPS capacities.¹¹ Almost half of STDF's project preparation grants went on to become STDF project grants and about one third went on to be funded by other donors.¹² This suggests success in the early part of the scaling pathway, transition from ideation, research, and development to proof of concept.

STDF **project grants** aim to strengthen capacity to meet international standards (CODEX, IPPC, WOA) and facilitate safe trade. Grants are meant to develop, implement, and learn from innovative, scalable pilots to deliver safe trade solutions at the global level. According to the STDF's Operational Rules, projects are rated highly for funding if they focus on identifying, developing, and disseminating good practices through multi-country, collaborative, and interdisciplinary approaches.⁷ The use of outputs of STDF Knowledge Work in the design or implementation of projects is encouraged. This suggests coherence and the scaling of the Knowledge Work. The perceived long-term sustainability of projects is considered in their review for funding. Despite consistent terminology around piloting projects, there are **differing perspectives within the STDF as to whether or not project grants are primarily intended to test innovative solutions or to respond to immediate SPS needs**. While not mutually exclusive, these two goals can come into conflict because testing innovative solutions often requires additional inputs and is associated with higher risk than tried-and-true methods to respond to immediate needs. Generally, STDF engagement ends at the end of grants; however, grantees are asked to report on

¹⁰ Monetary or in-kind. Least developed countries must contribute at least 10%, lower middle income countries contribute 20%, and upper middle income countries contribute 60%.

¹¹ This is done through P-IMA, see [P-IMA](#) section

¹² Of the 114 project preparation grants completed by 2024, 91 (80%) went on to become funded projects, with 35 (31%) of the follow-up projects funded by non-STDF donors.⁵



sustainability plans in their progress and final reports. Two projects a year are reviewed two-years after their closure to determine medium-term impacts.

“We are doing this piloting,..... then what after we’re done? Whose gonna take care of that platform? How’s that gonna work”

The STDF’s **Knowledge Work** combines activity funding with external expertise¹³ to determine what works well (and less well) for safe trade facilitation and disseminates these lessons through Practitioner Groups, events with partners, and other avenues to influence change. Much of the STDFs Knowledge Work focuses on increasing the reach and uptake of existing guidance and materials as well as cross-cutting topics like public-private partnership, good regulatory practices, evidence-based approaches, digitalization and e-certification, gender, and environment mainstreaming. The STDF supports a limited amount of basic science research, focusing more on developing knowledge products that can be easily adapted and adopted by other organizations and governments, leading to broad, systemic change. In this way, STDF prioritizes the development of transformative capacity and helping other organizations scale, as opposed to directly implementing projects at a large scale.

The **Global Platform** is a key pathway for the dissemination and scaling of Knowledge Work and successful grants. It aims to convene and connect stakeholders to build dialogue, drive synergies and create a collaborative eco-system for safe trade facilitation. The STDF’s position as an honest, third-party information broker is perceived to facilitate governments and other organizations adopting, adapting, and scaling lessons from other STDF workstreams.⁵ Bilateral conversations and leadership are thought to influence other stakeholders in the field. In this way, the STDF functions as an [intermediary](#),¹⁴ providing the enabling environment that is necessary for other organizations to scale projects, but not directly funding or implementing scaling itself.

As part of the Global Platform, the **Working Group** has a wide range of tasks, one of which is to meet twice a year to oversee STDF work. This includes approving new grants, selecting completed projects for external *ex-post* evaluations, considering findings and lessons of completed evaluations, and guiding knowledge work. During their review process for new applications, Working Group members often find linkages with their own work, the work of their organization, or the work of their grantees. Many Working Group members offer to facilitate introductions, which can be very useful for scaling when they occur. However, according to interviews, follow-up between Working Group members and the Secretariat is inconsistent. There has been some suggestion that Working Group members could be a key pathway to scale by funding successful STDF projects that align with their organizational priorities. This has been done in a few cases, but Working Group members do not systematically approach project closeout presentations with an eye towards finding promising projects to scale.

The STDF’s **project closeout** process links to and interacts with STDF’s Knowledge Work and Global Platform. As part of grant completion, projects are expected to submit an end-of-project report, submit to an independent end of project assessment,¹⁵ and host a project completion workshop. The end-of-project reports can include (often implicit) references to scaling in their sections on Sustainability and Follow-up (see quote for an example). Similarly, the Sustainability and Other Unexpected Results sections of the end-of-projects assessments sometimes reference scaling directly or indirectly. Because end-of-project reports and assessments are written at project closeout, the Sustainability sections of

¹³ The STDF leverages a wide range of external expertise, including external evaluators, SPS subject matter experts, and local stakeholders.

¹⁴ An entity that bridges the gap between innovation and large-scale adoption, facilitating connections between innovators, implementers, funders, and national systems.

¹⁵ End-of-project reports are written by grant recipients whereas projects assessments are written by independent evaluators.



project assessments often consider opportunities for scale, rather than reporting on scaling that has occurred.

“FAO is implementing another project that will not only support the domestication process in Zimbabwe but also promote the use of biopesticides. This, therefore, means that the SADC project has set in motion more work that will be sustained in the future.”⁸

Scaling of STDF projects

STDF projects report contributing to 30 pieces of SPS legislation, regulations, policies, strategies, structures, and processes since 2020.^{5,16}

The size of STDF grant funds does not seem to be directly related to scaling.^{5,17} Rather, **the ability to communicate results effectively and position projects within networks are determinants of scaling.**⁵ Stakeholders interviewed for this work identified four additional factors they thought made projects more likely to scale:

1. Activities need to be innovative and successful to scale. However, projects that are too innovative might take a long time to establish additional buy-in and be difficult to scale.
2. Activities should be relevant to local supply chains, support existing exports, and solve local problems. Activities that try to develop new supply chains or exports might experience additional challenges to scale.
3. Activities should align with donor priorities, either supporting value chains that have been prioritized by donor’s development support strategies or addressing specific SPS concerns of donors.
4. Beneficiaries need to be effective and advocate for themselves to build on achievements after the initial grant period.¹⁸

In the remainder of this section, we discuss three STDF activities that reached scaled to varying degrees: ePhyto, P-IMA, and the Centre for Phytosanitary Excellence.

¹⁶ These are important systemic enabling factors in any scaling approach. However, one-off changes may not lead to transformative impact at scale, since laws, policies, etc. need to be effectively implemented for impact and monitored and evaluated to ensure that they have the intended results.

¹⁷ Contrary to this finding from the 2024 external evaluation, one interview participant argued that the small size of STDF grants keeps them from being noticed by governmental bodies looking to scale projects. This person thought that preference would be given the scaling of moderately sized projects over scaling of small projects.

¹⁸ While not discussed by interview participants, an intermediary or coach may be able to advocate on behalf of beneficiaries to help them build on achievements after the initial grant if they do not have the capacity.



TESTIMONIALS OF STDF SCALED PROJECTS

The Good SPS Practices Guide that was developed in 2020 is becoming a national and international reference for the Penja Pepper Sector. Overall, this project remains a model and an example for the emergence and professionalization of the Penja pepper sector. [Penja Pepper Geographical Indication Group \(IGPP\), 2020 Annual Report](#)

The pilot is an important milestone for a fully traceable livestock value chain. The Ministry of Food Agriculture and Light industry is committed to scale up the pilot nationwide to support the government's strategic objectives to develop export markets for meat. [Jambalsterem Tumur-Uya, Agriculture and Light Industry, Mongolia, 2022 Annual Report](#)

Recognizing the important of GRPs [good regulatory practices] to cut trade costs for small businesses and drive intra-regional trade, 16 COMESA Member States endorsed a decision in December 2023 to implement GRPs in the COMESA region. This work builds on measures so that small-scale traders can benefit more from cross-border agri-food trade. [Mukayi Musarurwa, Technical Barriers to Trade Expert COMESA, 2023 Annual Report](#)

When you work with institutions like the STDF, it becomes a project that can be scaled and accelerated, which is essential in a world where diseases are spreading. [Richard Duncan, CEO of the Niue Honey Company, 2023 Annual Report](#).

ePhyto

The [ePhyto Solution](#) is likely the most successful and clear-cut example of scaling resulting from an STDF project. Developed to modernize the global trade of plants and plant products, ePhyto replaces traditional paper-based phytosanitary certificates with an electronic system. Paper-based phytosanitary certificates are prone to inefficiencies, delays, and fraud. Electronic certification is faster, safer, and more accessible. ePhyto is intentionally inclusive, built to accommodate the technical and financial constraints of developing countries, making it universally accessible. The ePhyto Solution has three integrated components:

1. A **central hub** allows the secure exchange of electronic phytosanitary certificates between National Plant Protection Organizations. It supports both country-specific certificates and generic phytosanitary certificates.
2. The **generic ePhyto national system** enables countries without their own digital infrastructure to produce, send, and receive electronic certificates.
3. Its **harmonized data structure** ensures interoperability between national and generic systems.

The STDF provided the foundational support for ePhyto, investing USD 1.1 million from 2016 to 2020. The project, implemented by IPPC, was guided by a wide-ranging partnership of 31 organizations, coordinated through a Project Steering Group, Advisory Committee, and Industry Advisory Group. Use of the central hub for the exchange of ePhyto certificates expanded rapidly.² The generic ePhyto national system was originally piloted in Sri Lanka, Samoa, and Ghana. At the time of writing, 96 countries were connected to the ePhyto Hub with 30 countries using the generic ePhyto national system. An additional 48 countries were testing connections with the Hub and 29 countries testing the generic ePhyto national system.



The impact is substantial.^{10,19} Although the generic ePhyto national system was designed for countries with limited technical and financial capacity, some high-income countries have seen its benefit and are also using the generic system. The central hub decreased the need for bilateral trade agreements for the exchange of phytosanitary certificates, greatly reducing time, costs, and fraud.¹⁰ Traders report lower costs and fewer delays, with fewer shipments held up due to documentary non-compliance. The IPPC Strategic Framework 2020-2030 includes eight development agenda items to achieve its objectives, one of which is the harmonization of electronic data exchange by digitizing the production and exchange of phytosanitary certificates through the IPPC ePhyto Solution.¹²

“The IPPC Secretariat joined forces with various institutions and countries to take a leading role on electronic certification so trade of plants and plant products is safer, faster and cheaper. We could get this outstanding result in implementing ePhyto Solution thanks to the trust and support of the STDF.”¹³

Implications for scaling: The global adoption of the ePhyto Solution – and future plans including development of a collaborative ePhyto initiative for Africa – suggests both horizontal and vertical scaling.²⁰ It is now being adapted and expanded to pilot the use of e-veterinary certification in Latin America and the Caribbean through an ongoing STDF project led by IICA with partners.¹⁴

P-IMA

Developed through STDF’s Knowledge Work, and piloted and applied through STDF supported projects and project preparation grants, the [P-IMA](#) (Prioritizing SPS Investments for Market Access) framework is a structured, evidence-based tool that helps countries make informed decisions about where to invest limited resources in SPS capacity. Using a seven-step process grounded in multi-criteria decision analysis, P-IMA brings together public and private stakeholders to transparently identify and rank SPS investment options based on potential trade, socio-economic, and other impacts. Designed for adaptability across contexts, the framework does not assess SPS capacity itself but builds on existing data to guide strategic planning. The P-IMA approach has been replicated across regions and institutions, with applications ranging from national food safety authorities to regional economic communities. Its participatory design has proven adaptable to different governance and institutional contexts, facilitating uptake.

From 2015 to 2023, the STDF funded the application of P-IMA through one regional project grant and eight project preparation grants, with a total financial contribution of USD 591,379.¹⁵ By 2023, P-IMA had been applied 20 times, with nine of these instances being organizations applying the P-IMA of their own initiative (i.e. not through STDF support),¹⁵ sometimes with funding from other donors.

P-IMA’s core strength in scaling lies in its ability to promote **ownership and alignment**. It is an inclusive, evidence-based decision-making tool that fosters trust in the prioritization process and helps show the business case of respective investments linked to policy goals. Country stakeholders and international funders both view the prioritized SPS activities identified through P-IMA process as credible. Partially as a result, over half of the SPS capacity-building options identified through P-IMA were taken forward for

¹⁹Findings are from an external evaluation that used a contribution analysis approach to determine impact. This structured qualitative approach is widely recognized as a valid approach to establishing an intervention’s contribution to impacts in contexts where quantification is impractical.¹¹

²⁰ Horizontal scaling: Scaling to new locations, places, populations, and institutions. Often referred to as replication; however, horizontal scaling can also be adaptive.

Vertical scaling: Embedding in and changing large scale (often national) systems, e.g. policy reform, changes to the policy enabling environment, or market systems. Vertical scaling can also refer to institutionalization.



funding into national action plans, legislation, or investment strategies, and over USD 2.8 million²¹ has been mobilized to support these investments. While the STDF sometimes funds some of the prioritized SPS investment options, interviewed participants reported that P-IMA results are regularly taken to other funders who view the application of P-IMA as credible evidence that investing in prioritized SPS capacities will lead to beneficial outcomes.

"It gives a platform for the stakeholders to discuss,... so that they are part of the decision, there's ownership and there's rationalization [in the] ... use of resources"

"The Philippines' B-SAFE development project, under the USDA-FFPr program, is adapting the STDF's Prioritizing SPS Investments for Market Access (P-IMA) framework to realize its objectives of improving SPS capacity to boost agricultural productivity and trade of agrifoods.... Our participation in the P-IMA practitioner group session enables us to learn best practices from countries such as Belize, Vietnam, and Mozambique that have employed the P-IMA framework successfully."¹⁶

Using the P-IMA process requires **technical capacity** (including an economist, as well as SPS experts and a facilitator) and the ability to use the **P-IMA software**. Despite training SPS officials on P-IMA through STDF projects and project preparation grants, the number of experts with the expertise to apply P-IMA remains very limited, reducing opportunities for application. Limited technical expertise, costs in applying P-IMA, and limited ownership of the tool itself have resulted in P-IMA not being re-applied as needs evolve.

Implications for scaling: The tool has been applied in many contexts, suggesting significant **horizontal scaling**. The outputs of the tool (i.e. the prioritized SPS capacity investment options) are frequently embedded into the national strategies, action plans, donor proposals, and legislation of host countries, suggesting **vertical scaling**. However, the lack of re-application of the P-IMA suggests that there is still opportunity to **scale deeply**²² within the countries where it has been used by supporting institutionalization.

Centre of Phytosanitary Excellence

The Regional Centre of Phytosanitary Excellence was launched through an STDF project grant from 2008 to 2010.¹⁷ The grant was for USD 714,375 (total project value including in-kind contribution was USD 801,735). Although the Centre of Phytosanitary Excellence was initially implemented by Centre for Agriculture and Bioscience International (CABI) and FAO, it was jointly managed by the Kenya Plant Health Inspectorate Services (KEPHIS) and the University of Nairobi, each of which **assigned two staff members** to support the Centre. An **advisory board was developed to represent national and international organizations**. During the grant period, the Centre offered four short, in-service courses and three university courses. The Centre also developed a Pest Risk Analysis tool to facilitate the regional sharing of pest information.¹⁸

Since the close of the STDF grant, the Centre of Phytosanitary Excellence has continued to grow and evolve. It now functions as a **public-private partnership hosted by KEPHIS**. It hosted four academic [Phytosanitary Conferences](#) and publishes the African Phytosanitary Journal. The Centre provides [16 trainings](#) lasting nine hours to 10 days and offers specialty consultancy services. These activities suggest

²¹ This is the amount of funding leveraged in the evaluation sample, but could be much higher if considering all applications of P-IMA.

²² Scaling deeply: Changing underlying values, behaviours, relationships, to ensure meaningful, lasting impact.



that the Centre of Phytosanitary Excellence continues to influence and support the development and adoption of good phytosanitary practices across the region. However, compelling quantitative or qualitative information on how the Centre has led to real-world, regional improvements in safe trade is unclear.

During the transition at the close of the STDF grant, the Centre of Phytosanitary Excellence **engaged in a strategic evolution to be sustainable**. Because KEPHIS had the institutional capacity, it became the host of the Centre, reducing ownership of other organizations originally involved in its governance, leading to decreased engagement and scaling opportunities. Another challenge was that the **assumption that a training centre could successfully charge fees and become self-sustaining proved to be, at least partially, incorrect** and COPE struggled with funding. Challenges running the training centre prompted the Centre to expand into hosting academic conferences and journal publication as alternate, funded activities. There is demand in these areas, and the Centre is continuing to influence the field through this work. KEPHIS's responsiveness to the changes in demand and **ability to keep the Centre functioning for the last 15 years demonstrate ingenuity in light of these challenges**.

"In terms of scale up, you know.... It was not factored into the project. It was assumed that it would happen anyway because ... there was demand for such a capacity building project "

Implications for scaling: The trajectory of the Centre of Phytosanitary Excellence highlights the critical role of **planning for handoff and scaling, raising issues around governance, sustainability, and mission alignment**. Questions emerged about optimum governance and business models and mission drift. The Centre's experience prompts reflection on whether it is scaling its impact on safe trade in the region or simply sustaining them. The proposed project preparation grant to evaluate the Centre of Phytosanitary Excellence may be able to respond to these questions.¹⁹ Such an evaluation could increase the Centre's ability to advocate for funding and provide the STDF with valuable information on the sustainability and scaling of the Centre.

Mainstreaming scaling

Although the STDF recently added scaling to its new Strategy, it has not yet determined how to operationalize the focus on scaling or the effects this will have on its work. The STDF is using this case study as an opportunity to reflect on its current positioning within the field and future opportunities to inform their decision to mainstream scaling. Therefore, any analysis of how scaling has been mainstreamed within the STDF must examine how scaling has been addressed incidentally, indirectly, and implicitly rather than through deliberate strategy. This does not reflect a gap in programming quality, but a conscious prioritization of other areas - groups are entitled to set their own priorities and scaling has not been STDF's historically. While the STDF has not been systematically supporting scaling, it has been *de facto* supporting scaling through these other priorities and mechanisms of change.

"I don't think there's been deliberate attempts to do scaling. Perhaps, maybe, it's in different forms"

Despite the new Strategy, there remain **mixed views within the STDF Working Group and Secretariat regarding to what extent and how scaling should be mainstreamed**. Interview participants generally fell into three categories:

1. A large group of participants thought that the STDF already was supporting scaling and welcomed the opportunity to mainstream this through integration into the strategy, MEL,



culture, incentives, etc. They thought that the formal operationalization of the STDF's de facto scaling goal could increase the STDF's effectiveness at catalysing change.

2. Another large group of participants agreed that the STDF already was supporting scaling, but cautioned against formalizing the STDF's approach to scaling. They thought the organic nature of the STDF's current approach to scaling was a key to its success; formalizing it could make it too rigid, increase resource requirements, and distract from the mission.²³

"If the project is really interesting, it would sell itself, so it would be scalable anyways."

3. A small number of participants thought that the STDF's role was not to support scaling. These people generally thought that the STDF should implement projects that directly support SPS capacity development and keep its scope limited.

We organize our discussion of the STDF's approach to scaling around 12 enabling and operational elements that can be used to track Mainstreaming Scaling:⁶

1. Vision, goals, and strategy
2. Definition of and a common language for scaling
3. Culture, incentives, and measures of success
4. Partnerships and intermediary function
5. Instruments, policies, and processes
6. Dedicated resources
 - a. Dedicated financial resources for scaling
 - b. Internal resources for costs to operationalizing scaling
7. Analytical frameworks, tools, and knowledge
8. Integration into monitoring, evaluation, and learning
9. Leadership
10. Decentralization and localization
11. Optimal scale; equity and inclusion
12. Mechanisms for tracking mainstreaming goals

²³ In our experience, scaling organically is rare. Reliance on organic scaling results in many promising innovations being abandoned.



Vision, goals, and strategy

HOW DO VISION, GOALS, AND STRATEGY RELATE TO SCALING?

Vision, goals, and strategy shape **how it defines success**—and whether scaling is treated as a priority or an incidental outcome. When scaling is embedded at the strategic level, it guides how programs are designed, how partnerships are pursued, and how success is measured.

Fundamentally, the STDF's vision, goal, and strategy align with scaling, making it a *de facto* scaling organization, even if it has not historically used this terminology. The previous strategy positioned the STDF as a catalyst for change and replication. The STDF did not position itself as a delivery mechanism for large-scale implementation. Instead, it defined its role as **convening, innovating, learning, and catalysing** safe trade practices that others—donors, governments, and international organizations—can adopt, adapt, and expand. This approach reflects the STDF's limited funding and strategic focus on influence over execution, with an emphasis on embedding successful innovations into national systems and regional frameworks. Although the STDF provides some funding, it focused on *"catalytic SPS improvements at national, regional, and global levels, driven by STDF partnership"* (STDF Outcome 2). The STDF also supported *"increased uptake of SPS good practices and knowledge products at the national, regional, and global levels"* (STDF Outcome 1). Though scaling terminology was not used in these outcomes, the STDF's emphasis on influence, uptake, and enabling environments reflects a clear logic of scaling by design. The intention of the STDF was to pilot innovative solutions that, if proven successful, could be replicated and scaled by others, not the STDF itself.

"What you can do from [US]\$1 million, which is the largest amount you can get from a PG [project grant], is a pilot. It's not transforming anything"

As of 2025, the STDF's goal is *"increased and sustained SPS capacity of public and private sector stakeholders in developing countries"* with a vision of contributing to *"sustainable economic growth, poverty reduction, food security, and resilience to climate change."*² This reflects a clear orientation toward **vertical scaling**—the transformation of national systems and institutional practices to address large-scale, global challenges. The STDF's 2025-2030 Strategy mentions scale and scaling 31 times.^{3,24} Descriptions of both the Knowledge Work and Grant Mechanism highlight the importance of scaling innovations and successful models. Scale is also repeatedly mentioned in the description of the mechanisms of change that the STDF intends to leverage. It intends to:

- *"Create an ecosystem that catalyses value creation, innovation, joint action and scaling, including through South-South dialogue and cooperation."*
- *"Test and develop concepts for scalable innovations that improve SPS compliance and reduce interceptions for greater market access, and cut trade costs for both the public and private sector, and that can be rolled out more widely."*
- *"Make the business case for scalable SPS innovations."*
- *"STDF catalyses change and helps to scale SPS improvements in developing countries worldwide. STDF workstreams identify and disseminate scalable SPS innovations to policymakers and practitioners (including WTO SPS Committee delegates) and private sector stakeholders,*

²⁴ This excludes use of the word "scale" meaning size, such as small-scale farmers.



and develop knowledge on how to scale SPS innovations at the level of the Working Group, Practitioner Groups and within projects and PPGs.”

- *“Leverage increased financing to scale SPS capacity development (including investments from the private sector and other innovative financing sources).”*

However, there are **different views within the STDF about whether it pilots innovative solutions or aims to immediately improve outcomes**. While not inherently at odds with one another, innovative solutions are often more expensive and higher risk than tried-and-true approaches in the short term. Implementing established approaches is often better at improving immediate outcomes while introducing new approaches tends to have greater opportunity for transformative change.

Summary and implications

Current actions to support scaling: The STDF’s vision, goal, and strategy are aligned with scaling goals, particularly vertical scaling.

Misconceptions and barriers to scaling: Although scaling is now in the STDF’s strategy, many STDF Working Group members still seem to be debating the merits of prioritizing scaling within the STDF. Some expect grants to generate knowledge that others can later scale, while others expect the STDF to directly deliver SPS outcomes. While many grants may be able to do both, strategic clarity on how the STDF will balance these two goals could improve alignment between funding decisions and STDF goals. Generating new knowledge often requires testing innovations that may not work, which results in a risk that projects will not directly deliver on SPS outcomes.

Incremental change opportunities: It may be helpful for the STDF to explicitly state where it intends to function on the transition to scale pathway (Figure 1). While everything functions on a continuum, clarity on the extent to which the STDF prioritizes piloting innovative solutions vs. achieving immediate SPS outcomes could support consistency in the strategy and action. Pilots could be positioned with the intention to catalyse widespread adoption of successful approaches. The four characteristics of projects likely to scale outlined in the section [Scaling of STDF Projects](#) could be used to identify promising pilots, which could be prioritized for funding. The STDF could also consider a formal recognition of the extent to which it aims to focus on horizontal scaling, vertical scaling, or scaling deep. This would allow it to consistently select activities that align with these objectives, again acknowledging that these are not strictly binary options. The STDF may wish to further specify the extent of its ambition and expectations from internal and external stakeholders with regards to scaling.

Transformational change opportunities: In addition to supporting pilots and developing new innovations, the STDF may wish to consider supporting the scaling of existing innovations and the transition to scale. This may position the STDF as an intermediary which mitigates the abandonment of promising innovations.



Definition of and a common language for scaling

WHY IS A DEFINITION OF AND COMMON LANGUAGE FOR SCALING USEFUL?

The absence of an agreed upon understanding of scaling leads to fragmentation—staff, partners, and decision-makers may each interpret scaling differently, leading to inconsistent priorities and diluted efforts. Without a clear definition, scaling becomes difficult to integrate into strategic planning, program design, or performance assessment. Establishing a common language enables staff to recognize scaling opportunities, articulate realistic goals, and coordinate efforts across functions. It creates a baseline for tracking progress and assessing whether the group is contributing to lasting, widespread impact.

There is **no definition or common language for scaling** within the STDF. Instead, as one participant noted, there is a “*cloud of scaling*.” Many interview participants, even some who did not support a formal focus on scaling, agreed that having a definition of scaling might facilitate communication, goalsetting, and strategic alignment. However, this view was not universal, with several people preferring that the topic remain “*organic*” and undefined.

The lack of a definition of and common language for scaling resulted in an impression that **sustainability²⁵ and spillovers²⁶ are synonyms for scaling** among many interview participants. The lack of a common understanding of the distinction between these terms has likely contributed to confusion about why the STDF should prioritize scaling when it already considers sustainability and spillovers.

“Scaling sustainability again to me, I really kind of use it as a synonym in a way.”

“I’m just going to call it sustainability, but I also mean scalability”

“The idea of the spillovers was probably with a view also to scaling up and other people adopting this type of thinking”

The ambiguous terminology around scaling has direct implications for the STDF’s core functions, such as the **Working Groups grant approval** processes. During the most recent review, many members mentioned that they supported applications because the projects were scalable. However, in the absence of a common understanding of what scalability means, these comments were difficult to interpret. While clearly of interest to the Working Group, scalability could not be used effectively by the group as a factor when deciding which projects to fund because there was not a consistent understanding of what a scalable project was.

Summary and implications

Current actions to support scaling: The STDF is already considering sustainability and spillovers, both of which are directly related to scaling. Scalability is discussed in the grant approval process.

Misconceptions and barriers to scaling: A lack of a common definition of scaling makes it hard for the STDF to communicate consistently and clearly about scaling. This is particularly apparent in divergent views about how to allocate the STDF’s limited grant funding, where clear terminology might help reach consensus.

²⁵ Sustainability refers to a project continuing after grant closeout, but does not necessarily refer to a project growing (or scaling) after closeout.

²⁶ The STDF often uses the term “spillovers” to refer to unintended influence or adoption by other organizations. This could be considered a form of organic or spontaneous scaling.



Incremental change opportunities: The STDF could develop its own definition of scaling. A possible definition is provided in the section on [Opportunities](#); however, this should be fully customized and owned by the STDF.

Culture, incentives, and measures of success

CAN CULTURE, INCENTIVES, AND MEASURES OF SUCCESS AFFECT SCALING?

A culture that values and rewards efforts to enable uptake beyond project boundaries, paired with performance metrics tied to sustained impact rather than short-term outputs, makes scaling more likely to be pursued intentionally. When staff are incentivized to think beyond the immediate success of a grant, and when norms reinforce collaboration, knowledge sharing, and long-term influence, scaling becomes embedded in routine decision-making rather than treated as an optional add-on. These cultural and incentive structures create the internal alignment necessary for scaling to be acted on consistently, not just endorsed in principle (see [Grand Challenges Canada](#) as an example).

STDF's culture emphasizes **collaborative support and trust-building**. These values underpin its reputation as a credible and impartial convener, align with its role as a catalytic platform for SPS innovation, and could provide a strong foundation for scaling. Currently, however, norms within the STDF reinforce bounded responsibility around individual grants as opposed to shared responsibility for catalytic global change. Institutionally, **scaling is considered outside the influence of the STDF by some interviewees**, and something STDF and its staff cannot be accountable for. Some project managers do not consider it their responsibility to support the transition to scale, but the grantee's job.

There is also **limited performance monitoring related to scaling**.²⁷ While closeout reports are required, longer-term follow-up is informal, and uptake is not tracked. Without incentives or systems that prioritize long-term influence, project teams focus on delivering within the grant period. This reflects a view of success shaped by bounded project cycles, not systemic change.

Many interview participants advocated against prioritizing scaling because they thought this would create an **expectation that everything must scale**. There was a widespread view that, if everything cannot scale, the STDF should not focus on scaling at all. It is true that not every project is meant to scale, and many deliver valuable impact within their limited scopes. However, this does not mean that scaling cannot be prioritized as a general principle. It may be inappropriate, impractical, or unlikely for certain interventions to scale, and discrete projects filling specific gaps have their place. The STDF will need to decide the extent to prioritize scaling without undermining STDF's capacity building mandate or distorting the balance of its portfolio.

"To confirm or guarantee that our projects are scalable, I think that's a mistake because there's so much stuff out there that it's completely out of anyone's control that it's a formula to lose."

²⁷ Scaling is mentioned once in the current MEL framework. This is discussed in the section on [Monitoring, Evaluation, Accountability, and Learning](#).



Summary and implications

Current actions to support scaling: A culture that emphasizes collaborative support and trust-building is likely to lay a strong foundation for partnership-based scaling.

Misconceptions and barriers to scaling: Scaling is often considered outside the control of the STDF. While the STDF does not have complete control over what gets scaled, it can use its influence to exert some control over which projects are scaled. In addition, there is an impression that deciding to prioritize scaling would mean that everything must scale. However, these arguments do not necessarily mean that scaling should not be prioritized at all, only that it should be rationally prioritized.

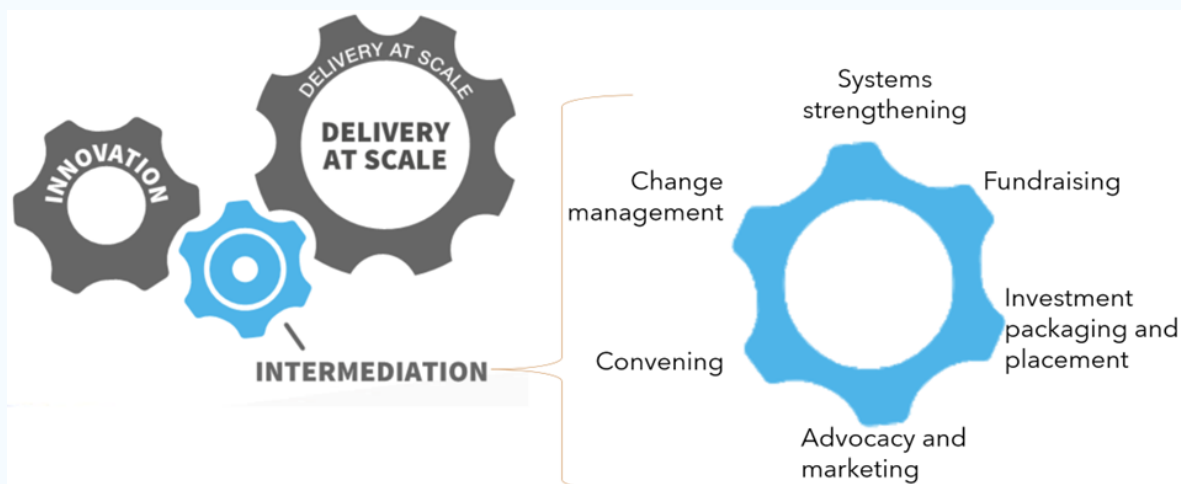
Incremental change opportunities: The STDF could specify what types of grants and activities should be designed for scale and clearly articulate reasons to pursue activities that are unlikely to scale. The STDF could set specific targets for the percent of its portfolio with “scaling potential” or include scalability as one dimension among many it considers in deciding which activities to pursue.

Transformational change opportunities: The STDF could then set realistic targets for the percent of project grants and Knowledge Work outputs that should be designed to scale and the percent that should ultimately scale²⁸ (see section on [Monitoring, Evaluation, Accountability, and Learning](#)).

Partnership and intermediary function

WHAT IS THE PARTNERSHIP AND INTERMEDIARY FUNCTION?

In scaling theory, an **intermediary** is an entity that bridges the gap between innovation and large-scale adoption, facilitating connections between innovators, implementers, funders, and national systems. It builds capacity, aligns stakeholders, provides technical support, and supports adaptive management. The **partnership function**, meanwhile, refers to the role of convening, networking, and leveraging relationships to channel resources and ensure sustainable uptake. Both can facilitate engagements between grantees and donors to secure funding for scaling.



²⁸ Professional experience suggests that only a small fraction of projects designed to scale will scale. The STDF is encouraged to conduct a benchmarking exercise, but may wish to consider a 10-20% goal.



With limited resources and a mandate to catalyse, not implement, change the STDF's most **powerful lever for scaling is its role as an intermediary**. Rather than scaling solutions directly, the STDF aims to create the conditions for others to do so: convening partners, brokering relationships, and amplifying what works. Although it has not explicitly adopted a scaling lens, the STDF's Global Platform functions as a passive intermediary; it creates the enabling conditions for networking and partnership that could facilitate scaling, but does not actively support activity design and handoff for scale.

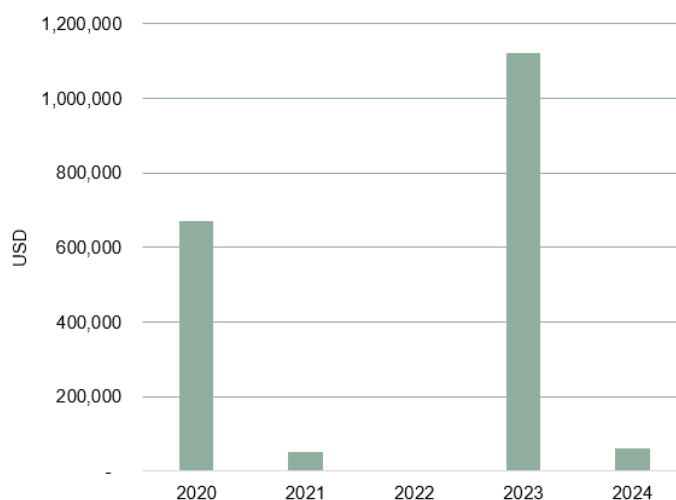
The STDF's credibility as a neutral, honest broker is seen by internal stakeholders and external evaluators⁵ as a core enabler of this catalytic role. Its ability to convene diverse actors and align interests through the **Global Platform has repeatedly opened doors for the uptake and adaptation of STDF-supported innovations**. In practice, these engagements often take the form of sideline conversations, informal introductions, or participation in project closeout events. Interview participants cited several specific examples of concepts and approaches that the STDF championed, and their organizations adopted.²⁹ However, these efforts are currently heavily dependent on individual initiative rather than institutional process.

"We emulated because... there was so much to be learned from it. And so that was a sort of organic scaling-up where we just sort of parasitized ... what they were doing because it was good"

The design of STDF's **Grant Mechanism already supports its catalytic and intermediary function**. Project preparation grants are often used to develop high-quality proposals to attract funding from other donors. Project grants are structured to promote broad ownership and support, requiring applicants to engage relevant ministries, secure endorsements from regional bodies, establish multi-stakeholder steering committees, and contribute in-kind or financial support. However, leverage of external funding is inconsistent and highly variable (Figure 2).

Project managers note that facilitation of **introductions to support transition to scale requires significant time-resources** and that securing follow-on funding tends to be slow and uncertain. Handoffs depend on precise alignment between the innovation and the strategic priorities of potential funders, something that is difficult to engineer without dedicated resources and strategy. The STDF's high reliance on international implementing partners allows it to leverage the networks of these implementing partners rather than needing to conduct all intermediary and relationship building work itself. However, this may reduce opportunities for local partners. Grantees, for their part, **question how they can pursue scale or follow-up activities without transition support** (see section on [Dedicated Resources for Scaling](#)).

Figure 2: External funding leveraged



Source: STDF monitoring data

²⁹ These examples are not shared in this report because participants requested anonymity, and the examples would allow for the identification of interview participants.



"Sometimes we [grantees] have projects where the project ends and we wash our hands and that's the end of the story. I think partnerships also ensure that that doesn't happen."

The STDF **Working Group** has the potential to support handoff and project scaling and has done so in several cases. Its composition—bringing together donors, international organizations, and regional bodies—positions it well to function as an intermediary; however, its engagement with projects is generally limited to proposal review and selected updates. Individual members sometimes independently support the continuation or expansion of STDF-funded work, but there is no formal process linking Working Group members with projects that align to their organizations' interests to facilitate handoffs. Many of the Working Group members represent extraordinarily large organizations, and sometimes parts of their organizations seem to scale (or be interested in scaling) STDF projects independently of the Working Group members. As a result, the potential of the Working Group to function as an intermediary platform has remained unrealized in practice.

The gaps identified in coordination, follow-up, and systematic handoff should not be seen as failures, but as natural outcomes of an approach that has prioritized other objectives. These are not signs of underperformance, but indicators of untapped potential. If STDF were to adopt scaling as a strategic focus, the existing structures of the **Grant Mechanism, Working Group, and Global Platform** offer a strong base and clear opportunities for deeper and more intentional partnership and intermediary work to support scaling.

SCALING THROUGH INTERMEDIATION AND PARTNERSHIP^{20, 21, 22}

A project example: An STDF project developed a locally adapted Code of Practice for the peppercorn value chain in Viet Nam, Lao PDR, and Cambodia. The project was generally successful and improved the safety of the peppercorn supply chain in all three countries. Representatives from GIZ and the EU Delegation in Cambodia were invited to the project closeout meeting and they committed to scaling the Code of Practice into the Euro 10 million EU-German CAPSAFE project focused on sustainable farming practices and market opportunities for smallholder farmers in two value chains (including peppercorn) in Cambodia. This is expected to increase the reach of the guidelines and the adoption of best practices developed by the STDF project.

Quotes from Annual Reports:

"The STDF's work is contributing fully to the new FAO strategy to support the transformation to more efficient, inclusive, resilient and sustainable agri-food systems." [Maria Helena Semedo, Deputy Director-General, FAO, 2021 Annual Report](#)

"The STDF, through PPGs [project preparation grants] and knowledge products, serves as an incubator for innovative ideas that we can use to strengthen, scale and apply in our programmes." [Betsy Baysinger, Division Director, Foreign Agriculture Service, USDA, 2023 Annual Report](#)

Summary and implication

Current actions to support scaling: The STDF's partnership work, particularly its Global Platform, create the space for networking and intermediation, which supports vertical scaling and handoff.

Misconceptions and barriers to scaling: While the STDF creates the space for grantees to engage with funders, the STDF Secretariat and Working Group do not always actively use their influence to facilitate



handoff. Grantees and implementers are often expected to proactively seek follow-up opportunities. There is an assumption among some in the STDF that successful projects will scale themselves, without needing intermediation and the active support of stakeholders. In our experience, this is often impractical and results in promising innovations being abandoned.

Incremental change opportunities: The STDF may wish to develop a flexible framework specifying the intermediary functions it would like to pursue, allowing for different approaches depending on grant contexts. It could specify that implementing partners are expected to have their own networks to facilitate the transition to scale or that grantees should include funding for networking in their application budgets.

Working Group members could shift their perspective during grant review sessions to try to proactively identify and advocate for projects that their organization would be interested in scaling, if they proved successful.³⁰ Working Group members and the Secretariat could systematically follow-up on identified synergies, which often remain unpersuaded under the current approach. Initially, these shifts could be largely in the framing and culture of the Working Group, becoming embedded into the structure and functioning of the Working Group over time. If useful, a sub-group within the Working Group could be organized for members interested in facilitating the transition to scale. The Secretariat might require some limited additional resources for more follow-up with Working Group members.

Transformational change opportunities: Beyond asking Working Group members to volunteer as intermediaries, the STDF could consider formalizing the intermediary role by selecting among the following options (or others that were not identified) to support the transition to scale:

- Creating formal partnerships with selected international implementing organizations for them to leverage their networks to provide coaching and matchmaking for scaling
- Hiring external consultants to provide coaching and matchmaking for scaling, similar to the donor-facilitator role used by the Enhanced Integrated Framework at the World Bank (see [Grand Challenges Canada](#) example)
- Identifying dedicated staff within the STDF to facilitate partnerships and intermediation

The adoption of any of these approaches would likely need to be accompanied by dedicated funding to ensure that the responsible parties allocate the necessary time and energy to execute this role.

Instruments, policies, and processes

HOW DO INSTRUMENTS, POLICIES, AND PROCESSES AFFECT SCALING?

Instruments, policies, and processes shape what gets funded, how projects are structured, which results are tracked, and what behaviours are rewarded. When these systems embed scaling, they help successful innovations to be positioned for broad and lasting impact by encouraging adaptability, planning for uptake, or facilitating handoff.

In line with the STDF's current priorities, its instruments, policies, and processes are designed to support innovation and learning. Although they are not explicitly designed for scaling, **elements of the STDF's processes already support scaling**. Knowledge products are designed to be adaptable to low-resource

³⁰ This would not imply an *a priori* commitment to fund the projects.



contexts, enabling replication with modification. STDF, through its Global Platform, disseminates good practices and influences broader systems, supporting vertical scaling. The flexibility offered grantees to re-allocate funding to leverage emerging opportunities during project grants also facilitates scale.

However, there are **no formal requirements for grant applicants to consider how their results might be adopted, expanded, or integrated into broader systems**. Similarly, grant assessments do not include defined criteria related to scalability. As noted earlier, while the Working Group sometimes references “scalability” in project review discussions, the term is not clearly defined or consistently applied, limiting its practical value in selection decisions.

In interviews and the Working Group meeting, there was extensive discussion about whether scaling should be introduced into the grant application process. Some felt that a dedicated question could encourage early thinking, help identify grantees with ambition and vision, and surface promising scale pathways. Others warned that such a requirement might generate vague or generic answers using AI, advantage more technically sophisticated applicants, or impose unrealistic expectations. A few raised concerns that questions about scaling would result in applicants misrepresenting or being untruthful about their level of national support and potential future avenues for scaling. However, it is unclear why these concerns would apply only to a question on scalability and not to the application process as a whole. Nonetheless, **verification of scalability claims could be time and resource intensive**, especially without an extensive local network.

“Sustainability is already being considered by the applicants and by the STDF Of course, when the STDF evaluates the proposals, the STDF values more the proposals that have potential for scalability. So, we believe it's already being considered even though it's not written in the form very explicitly.

On the skepticism of the participants [regarding asking questions about scaling in grant applications], two things called my attention. Part of the applicants were concerned about generating more obligations to [i.e. work for] the applicants. Even the funders were concerned about it. And second, some were concerned about false promises that people would fill the blank on scalability with something that is only a false promise. It can happen or not, but it's aspirational, very aspirational, just to increase their chances of getting the funds.”

The demand driven nature of STDF grants was often cited by interview participants as a challenge for scaling. Interview participants argued that the STDF cannot control what projects get submitted and funded because it does not make calls for specific types of applications. However, the STDF received 199 applications in 2024 and funded 7 projects,²² so **it clearly has significant latitude in deciding what to fund**. In addition, the STDF works extensively with promising applicants to help them refine their applications and could support them integrating scaling into their design (see box on [Scaling through Flexible Funding and Intermediation](#)).

To support uptake and visibility, the STDF requires a formal **project closeout process**, including a final report and a workshop involving stakeholders and potential funders. These provide the opportunity to share lessons learned and for other actors to replicate or expand on project results. However, according to interview participants, these events are **not consistently leveraged** to facilitate strategic transition to scale. Attendance from potential scale partners is inconsistent and follow-up is not systematic. In addition, engagement at closeout often comes too late and does not allow the necessary time to build trust and buy-in between potential follow-up funders and grantees. Continuous engagement during the project cycle can allow grantees and project managers to identify and act on emerging opportunities, rather than waiting for project closeout.



At project closeout, there is **no institutional mechanism to support transition to scale**. Grantees do not develop scaling plans or identify scaling partners, and the STDF does not provide structured support for continuation, such as strategic matchmaking or policy alignment. Even the three examples highlighted in the section on [Scaling of STDF Projects](#), faced continuing challenges related to long-term funding. Closeout workshops and final reports focus on documentation and reflection, not on embedding results into broader systems. As a result, promising innovations often conclude without a viable pathway to broader uptake.

"We're there for the applicants at the beginning, then implementation, then there is evaluation, but then that's normally it.... Usually, there is no kind [of] hand holding or really checking what happened."

The STDF often informally undertakes steps that formal processes could help systematize. While scalability is not formally considered in the application process, it is still discussed; while the project closeout process is not consistently leveraged, it has been used to support handoff; and while there is not a formal process for the transition to scale, an informal one often develops. These process are already happening, but could be done more and better. As noted by interview participants, the STDF will also need to be cautious about developing an overly bureaucratic system which reduces motivation, flexibility, and creativity in the pursuit of systematic scaling. One option might be to leave some of these administrative processes flexible, but heavily invest in a [culture and incentive structure](#) that promotes scaling to induce more individual action without imposing constraints.

Summary and implications

Current actions to support scaling: STDF Knowledge Work can support scaling by being intentionally designed for easy adaptation and adoption across low-resource contexts. Its Global Platform supports the dissemination of good practices, which can enable vertical scaling. The STDF's approach to flexible funding, allowing grantees to reallocate fundings to leverage emerging opportunities, aligns with the dynamic needs of scaling.²³

Misconceptions and barriers to scaling: Although STDF grants are demand driven, the STDF has significant latitude over the types of projects it chooses to fund and engages in late-stage co-design with promising applicants. However, scaling is not formally considered in the grant application process. Grantees are not asked to discuss scaling and reviewers do not consider scalability in their scoring process (see [Appendix 2](#) for Tools and Checklists related to scalability). While the project closeout process includes a workshop, continuous engagement with potential funders to build the trust required for follow-up funding is not supported.

Incremental change opportunities: The STDF could allow grantees to self-identify as having scalable applications and use this as one criteria among many when deciding what to fund, without requiring that all applicants demonstrate scalability. Without increasing total project funding, the STDF could encourage grantees to use some of their budget for continuous donor engagement throughout the project lifecycle, not just at the end of the project. The STDF could also facilitate this engagement, particularly with Working Group members. Rather than leaning heavily on formal administrative structures, the STDF may wish to develop flexible guidance materials that can be applied on an as-useful basis and is encouraged, but not mandated, through shifts in culture and incentives.

Transformational change opportunities: The STDF could start offering coaching to grantees interested in designing for scale and support grantees generating data for scalability through project preparation grants. It could adopt a formal expectation that Working Group members **consider integrating successful approaches that align with their own priorities** into their SPS programmes. This expectation



might be particularly applicable to the countries that advocated for the projects during the review and approval process.

The STDF could consider dedicated funding for the transition to scale (i.e. the missing middle). This could be piloted on 1-3 promising projects and would not need to be widely implemented at first.

SCALING THROUGH FLEXIBLE FUNDING AND INTERMEDIATION^{24, 25, 26}

An STDF project to harmonize regulations on biopesticides benefiting six Southern African Development Community (SADC) countries scaled partially as a result of **strategic design modifications** recommended by the STDF and **adaptive management**. As part of the project, specific guidelines for biopesticides registration in SADC countries were developed and technically endorsed by the Southern Africa Pesticide Regulators Forum (SAPReF). To ensure sustainability, and extend impact beyond the original scope, the STDF requested the implementing partner, International Centre for Genetic Engineering and Biotechnology (ICGEB), to actively support the process of having the guidelines considered by the SADC Council of Ministers. This did not change the overall budget of the project. In June 2025 (after project completion in August 2024), the Guidelines were approved by the SADC Council of Ministers, extending their applicability to all 17 SADC member countries.

The project **leveraged and fostered robust partnerships** to expand its reach. Due to widespread interest and support, a continental workshop, organized by the grantee and initially planned on a small-scale, was significantly expanded to nearly 300 participants through co-funding and additional direct financial support from partners like USDA and CABI. This collaborative approach, actively promoted by STDF, enabled cross-regional learning from similar biopesticide projects and fuelled ongoing discussions for even wider, continental impact and future investments.

During execution, STDF's **flexibility and responsiveness proved critical for adjustments** that supported scaling. This flexibility included approving a six month no-cost extension to overcome delays in obtaining feedback from SADC Member Countries, rescheduling in-country workshops, and aligning field trials with pest seasonality. The adaptive approach ensured that key activities necessary for wider adoption, such as finalizing harmonized guidelines and developing in-country implementation roadmaps, could be completed effectively.

"This project was efficiently implemented, and this was influenced by the STDF Secretariat's flexibility, responsiveness, and support, which was crucial throughout the project. There was strong collaboration between project partners and not only participating countries, but the SADC members." [End of Project Assessment](#)

Dedicated resources for scaling

WHY ARE DEDICATED RESOURCES NEEDED FOR SCALING?

Scaling requires both funding and internal capacity—dedicated financial resources to support uptake and sufficient staff time, skills, and systems to guide the process. When organizations lack either, scaling efforts tend to remain informal, under-resourced, and dependent on individual initiative. Resources do not need to be abundant, but they need to be intentional.



Although the STDF has historically funded catalytic activities, **it did not have dedicated funding for scaling**. This is in line with its recent priorities and extremely limited resources. Funding can be used for scaling during projects. Grantees have been encouraged to engage in extensive dissemination and outreach activities, invest in stakeholder buy-in, and modify projects to take advantage of emerging opportunities. However, there is no end-of-project financial support for the transition to scale.

"We always felt ... the flexibility. Understanding if it was justified, ... it can be modified. If it makes more sense to do something else,... if it can have more impact, let's do it."

The STDF is **beginning to develop internal capacity to address scaling systematically based on the 2025-2030 Strategy**. The 2025 Secretariat workplan includes several activities that touch on scaling: this case study, a regional workshop on innovation and scaling, a publication on SPS innovations, and a study on alternative financing for SPS capacity. These efforts largely combine innovation and scaling, but do not specify the extent to which innovation should be in the pursuit of scaling (i.e. innovation for scaling, not just innovation and scaling). Combining the two raises the possibility that activities could support innovation without supporting scaling.³¹ A formal expectation of the percent of innovations that should have scaling potential could provide strategic clarity about this balance between innovation and scaling.

Resource limitations have pervasive implications, which are mentioned throughout other sections of this analysis as well. Project managers' heavy workplans generally do not specifically allocate time, travel budgets, and other resources to support their partnership and intermediary roles. They are expected to facilitate introductions and promote dissemination opportunistically; however, a continuous flow of new work limits their ability to follow-up on completed projects. As a result, when promising models emerge, they often conclude without structured pathways for continuation or scale. **Without dedicated time allocated to support scaling, project managers cannot add another objective to their already full workplans** and scaling is likely to become another unfunded mandate for overburdened staff to implement.

Interviewer: "If STDF does decide to adopt a more formal focus on scaling, what will be the challenges in it doing so?"

Respondent: "Without resources, it will be impossible, just impossible."

In addition, neither staff nor grantees currently have access to tools, guidance, or training on how to scale projects effectively (see section on [Analytical Frameworks, Tools, and Knowledge](#)). If scaling were to become a formal focus, these capacity gaps would need to be addressed through new investments in both staff time and technical support.

Summary and implications

Current actions to support scaling: The STDF is beginning to invest in internal capacity to support scaling. It included scaling activities in its 2025 workplan and identified one staff member as the contact point for this year. The commissioning of this case study is a concrete example of dedicating funding for scaling.

Misconceptions and barriers to scaling: The STDF is starting to provide core, strategic funding to explore scaling, but funds are limited and not available to support scaling of projects and activities. Project managers are not resourced to support scaling activities or follow-up for their grantees.

³¹ Innovative projects are not always designed with scaling in mind and, sometimes, highly innovative projects can be difficult to scale. They may take more time to establish buy-in and support, require expensive technologies, and be difficult to adopt.



Transformational change opportunities: The STDF could invest in staff training and time to support scaling or hire external coaches with specific expertise in the local system, politics, and sector. This could include providing coaching during the application process to design for scale, supporting outreach and intermediation during projects, and following-up on projects after closeout to continue scaling efforts. Dedicated funding for grantees to pursue these activities, particularly funding continuous engagement for scaling during projects or in the transition to scale, could also be considered. Such additional funds could include support estimating demand, measuring cost, and building scaling capacity. This approach could be initially piloted on 1-3 staff and projects before making a decision to implement widely.

Analytical frameworks, tools, and knowledge

HOW CAN ANALYTICAL FRAMEWORKS, TOOLS, AND KNOWLEDGE SUPPORT SCALING?

When intentionally designed to support adaptation, uptake, and institutional integration, knowledge outputs help ensure that innovations can move beyond pilots into broader use. They can include tools that guide design for scale, knowledge products that highlight transferable lessons, and frameworks that help stakeholders assess scalability in context. Without these, even effective solutions risk remaining isolated or context-bound.

Within the STDF, there could be two conceptually distinct types of knowledge products relevant to scaling: scalable knowledge products and knowledge products about scaling.³²

Scalable knowledge products: STDF's Knowledge Work generates briefings, guides, tools, and assessments that are widely seen as adaptable and relevant across low-resource contexts. These products are frequently re-applied in new settings,⁵ often with support from STDF project preparation grants. Facilitators of the widespread uptake of STDF knowledge products seem to be:

1. They are demand-driven, developed in response to field-identified needs.
2. They are co-created with stakeholders, enhancing legitimacy and ownership.
3. They strike a balance between generalizability and usability. They are generic enough to be adaptable, but specific enough to be actionable.

"Sub elements of some of these projects.... have been integrated then back into other programmes or initiatives that we're leading elsewhere... I'm thinking here about some of the work we've been doing around good practice guides and the dissemination of these guides amongst farmers and how the experience that we've had - in this case it was in Cameroon, Cameroon and Togo - has further improved and refined our approach in a number of other countries for other guides, so there's also some kind of cross fertilization"

"We have sought intentional synergies with STDF's work, from engagement in STDF's regional biopesticide projects and the new eVet project in Latin America and the Caribbean to piloting the STDF GRP [good regulatory practices] Guide in Africa. This collaboration spreads SPS knowledge and good practices more widely and also strengthens our work." – 2024 Annual Report

³² As with all things, these are not strictly binary and some Knowledge Products may fall into both categories or somewhere in between.



However, two constraints to the scaling of STDF Knowledge Work were identified:

1. **Resources:** While the STDF currently pays for the D-Sight software used for its flagship P-IMA Knowledge Work, it is unclear that this will be practical in the long-term as the tools become more widely used.
2. **Knowledge access:** A wide range of successful knowledge products has been developed, offering valuable resources for stakeholders. To maximize their impact, there is an opportunity to further strengthen visibility and dissemination, ensuring these tools are easier to locate in places and more widely utilized.³³

Knowledge products about scaling: While the STDF produces many tools that are themselves scalable, it does not currently provide tools or guidance on how to scale projects. There are no resources to help grantees design for scale, manage transitions from pilots, or assess the scalability of innovations. This absence reflects the STDF's historical focus on piloting and learning over scaling.

Summary and implications

Current actions to support scaling: Outputs of STDF Knowledge Work are designed with scaling in mind. They are meant to be widely adaptable and adoptable across low-resource settings.

Misconceptions and barriers to scaling: The STDF does not have dedicated tools to support scaling. It does not have resources for grantees to reference in the design and implementation of projects to increase the likelihood of scaling or for project managers to guide projects for scale.

Incremental change opportunities: The STDF could continue knowledge management efforts to respond to challenges mentioned by some interview participants in finding existing Knowledge Work outputs. The STDF could also invest in developing scaling guidance for both grantees and staff, possibly with external support. This could include tools that grantees could use to design projects for scale and resources for staff to build capacity in scaling strategy.

³³ Some of this challenge may be rooted in the sheer amount of Knowledge Work that the STDF has produced, which inherently is harder to organize and access than small bodies of work. To some extent, challenges finding resources suggest that there are a lot of valuable resources available and could be viewed as a natural consequence of successful knowledge production.



Integration into monitoring, evaluation, and learning

WHY INTEGRATE SCALING INTO MEL?

There is a saying, **“what gets measured gets managed.”** When MEL frameworks track outcomes beyond the project level, capture evidence of uptake, and generate insights about what enables scale, they serve as a feedback loop for strategic decision-making. Conversely, when MEL systems are limited to short-term outputs or project-level activities, they can obscure whether and how change persists or expands. For scaling to become a meaningful objective, organizations must align MEL with long-term influence and uptake.

The STDF's 2020-2024 MEL framework²⁷ referenced scaling three times:³⁴ once while discussing how partnerships can support scaling, once while discussing how MEL can create learnings that support scaling, and once within an indicator itself. The indicator - *“evidence of adaptation, replication, and scaling of STDF approaches”* - is directly relevant and was defined in the accompanying results matrix as follows *“STDF approaches are approaches and practices developed and/or recommended through STDF supported work (e.g. P-IMA, stronger linkages between SPS and other border agencies, e-Phyto, etc.)”*. It is unclear how this indicator should be tracked or aggregated across projects to enable comparison, learning, or portfolio-level analysis, and there was no definition of adaptation, replication, and scaling. As a result, it does little to clarify what scaling looks like in practice or how progress might be assessed. Other **indicators in the MEL framework may be more relevant to scaling in practice:**

- Five indicators related to the Sustainable Development Goals
- # firms with an increase in exports, disaggregated by gender and size of firm
- # of STDF initiatives and PPGs/PGs contributing to changes in SPS legislation, regulation, policies, strategies, structures and/ or processesEvidence of improved implementation and enforcement of food safety, animal and/or plant health measures for trade
- Value (US\$) of new investments leveraged
- #, type of collaborative networks, relationships, initiatives at global, regional and/or national level that support the delivery of change in SPS systems
- Evidence of the coordination and/or alignment of SPS capacity development interventions by WG members
- # of people reached (disaggregated by women/men and geography/region) with STDF good practices, knowledge products
- # of downloads of different types of knowledge products from website, disaggregated by geography
- Evidence of uptake and application of good practices and knowledge products produced by STDF to inform and support SPS capacity development led by global / regional / national bodies

²⁸

³⁴ This excludes references to “scale” in the sense of “small-scale farmers”.



These indicators cover a range of transformational (e.g. the SDGs, legislation, and uptake at the global level) and transactional (e.g. # people reached, # downloads) scaling indicators. For an entity that does not directly prioritize scaling, **the STDF clearly tracks many indicators related to scaling**. And, the STDF is in the process of revising its MEL framework and considering adding additional indicators for scaling.

The STDF also asks grantees to regularly report on key indicators through their online reporting software LogAlto. This gives the STDF the opportunity to systematically track indicators across projects and compare to identify the types of projects that tend to scale; however, such a comparison has not yet been completed.

As noted in the sections on [Instruments, Policies, and Processes](#) and [Dedicated Resources](#), a major constraint in the current MEL system is the **lack of project tracking after grant closeout**. The STDF has a well-defined closeout process—final reports, independent assessments, and dissemination through workshops. According to the STDF MEL Framework and Operational Rules, at least two projects a year are selected for evaluation two-years after projects end. However, scaling often takes place over the course of 10 to 15 years, and longer-term follow-up does not exist. Without this, the partnership will not be able to reliably identify which innovations scale, how, or under what conditions. Previous attempts to gather information from Working Group members about post-project uptake yielded too few responses to continue.

Difficulties measuring scaling were often cited in interviews as a reason not to prioritize scaling. Several participants

argued that scaling should not be prioritized because it could not be reliably measured or that the expense required to measure scaling was not worth the investments. In both cases, the argument was that other areas should be prioritized because they are easier to measure.

“Once you start to say that this is a focus, you’ve got to capture it in some way. And so, the effort goes into the capturing rather than in just the doing.”

Another key opportunity would be to **encourage grantees to collect data to support future scaling efforts**. Innovative projects often need to be costed, have demand assessed, and capacity analysed in order to be scaled. Project preparation grants can be used to conduct these activities, but grantees could also be supported in collecting this information during their projects with an intention to use the data in the step of the transition to scale.

SCALING INDICATORS²⁷

Best practice for transformational scaling indicators requires going beyond one-off project outputs to assessing whether interventions foster **sustained, system-wide change**. Indicators should explicitly capture **impact sustainability**, such as the percentage of beneficiaries or institutions maintaining outcome benchmarks five years after project closure, and **systemic adoption**, such as whether innovations are codified into national SPS regulations, budgets, or industry codes. To track whether scaling pathways are materializing, indicators can measure progress against planned milestones (e.g., champions engaged, financing secured), the strength of enabling conditions (policy, financing, partnerships, leadership), and catalytic uptake by third parties, reflected in the replication of models and mobilization of external resources. Together, these measures link immediate project achievements to credible evidence of long-term resilience, institutionalization, and system-wide transformation, reinforced by the MEL framework’s planned post-project evaluations two to three years after closure.



Summary and implications

Current actions to support scaling: The STDF already has many indicators related to scaling in its MEL framework. It also supports systematic data collection by grantees, which could be used to support MEL for scaling.

Misconceptions and barriers to scaling: Grantee data and project follow-up have not been leveraged for cross project comparisons to identify characteristics of promising projects for scaling. Innovations often take 10 to 15 years to scale; although, clear signs that an innovation will not scale can emerge well before this timeframe. Analysis about scaling might start two years after a project, but the tracking evolution of projects over the subsequent 10 years as they scale could provide valuable insights.

In addition, difficulties measuring scaling are often used as justification for not prioritizing scaling. While the costs of measurement should not be ignored, the STDF already is measuring many indicators related to scaling. Data availability should not drive partnership priorities; partnership priorities should determine the data it invests in.

Incremental change opportunities: The STDF could start by leveraging the data it already has to identify characteristics of projects that tend to scale.³⁵ Existing data sources include LogAlto, project closeout documents, external evaluations, and case study briefs. The STDF could also consider doing more, light-touch but longer-term follow-up with projects. For example, it could conduct a short interview with national stakeholders every two years after projects closeout, only continuing to follow-up with those projects that appear to still be active.

While most quantitative approaches to impact evaluation might not be practical for the STDF, a synthetic control impact evaluation might be possible and could be explored if of interest to the STDF. Qualitative evaluation approaches, such as outcome harvesting and contribution tracing, could be applied to determine the partnership's contribution to impact at scale.³⁶ The STDF is already revising its MEL framework and could integrate transformational scaling indicators into the new framework.

The STDF could also support its grantees collecting data for the future scaling of their projects, such as costing scaling opportunities and demand assessments.

Other enablers of mainstreaming

Due to the STDF's current early stage in its Mainstreaming Scaling journey, the remaining four enablers have not been addressed extensively. As such, they are discussed briefly in a single section.

Leadership: Leadership sets strategic direction and institutional priorities. When leaders champion scaling, it becomes more likely to be pursued intentionally and resourced appropriately. However, given the STDF's unique structure as a partnership, the question of leadership is inherently complex; there is no obvious and clear leadership to provide strategic direction on scaling. While the Working Group is meant to provide strategic direction and approved the integration of scaling into the strategy, interviews

³⁵ The section on [Scaling of STDF Projects](#) provides a numbered list of characteristics interview participants thought made projects more scalable. Systematic analysis of the STDF's project portfolio to determine what projects had scaled was determined to be out of scope for this work.

³⁶ Quantitative impact evaluations are a broad category of evaluation that causally attributes a change in outcomes to a project and measures that change numerically. Synthetic control analysis is a type of quantitative evaluation that leverages a weighted average of comparison areas in order to establish causation. It is specifically designed to address cases where there is only one treatment unit (i.e. the project took place at the country-level in one country) and often relies on large, historical, routine data (ex. export data that has already been collected for decades). Qualitative evaluations leverage interviews and text review to understand a projects contributions to real-world change. They are often appropriate for complex projects with data-availability challenges.



showed that many Working Group members were still uncertain about the extent to which they thought the STDF should prioritize scaling. This is likely to lead to challenges as the Secretariat tries to operationalize the strategy. So, **without further consensus from the Working Group, the Secretariat will likely struggle to take decisive action on scaling.**

Decentralization and localization: Scaling often requires local adaptation and ownership. Decentralized structures and localized decision-making enable more responsive, contextually grounded approaches to sustaining and expanding impact. As a relatively small group without significant in-country presence, the topic of decentralization is not applicable to the STDF; there is one office that cannot be functionally decentralized. The STDF's projects support localization by being demand driven and initiated by local governmental or private sector actors. Requirements for match contributions from host country governments are intended to support localization by further demonstrating local ownership and support. Project preparation grants feature a validation workshop designed to support country ownership and follow-up with other donors who are often invited to attend. The STDF regularly encourages engagement with national and regional bodies, and these have been a key pathway to scale. The STDF plans to build on this in the new strategy through Regional Links. The STDF's expanding work on Regional Links and learning networks³⁷ is meant to support cross-country learning, with the intention that countries will adopt the promising approaches applied by others (i.e., horizontal scaling).

Optimal scale; equity and inclusion:

Scaling efforts must consider what level of scale is appropriate for their context and ensure that benefits reach underserved or marginalized populations rather than reinforce existing inequities. In recent years, the STDF has championed gender-responsive approaches in SPS systems.²⁹ These approaches focus on mitigating gender-related disparities in access to resources and opportunities for safe trade. However, the extent to which the STDF considers other inclusion and equity dimensions (e.g., indigenous communities, people with disabilities, youth) is unclear. Furthermore, given that the STDF does not have criteria for making decisions on scaling, **it cannot systematically make decisions to scale based on equity considerations.** However, as they have noted with gender, trade

SCALING GENDER WORK

Even though the STDF does not explicitly consider equity in its scaling efforts, its equity efforts are being scaled. In particular, several organizations have indicated that the STDF's gender mainstreaming work informed their own approaches:

STDF's Gender assessment has played a catalytic role in informing efforts to support gender mainstreaming in the IPPC Secretariat's work, including on awareness-raising session on gender to the phytosanitary capacity evaluation course Sarah Brunel, IPPC Secretariat, 2022 Annual Report

France intends to use the findings, conclusions and recommendations of the STDF gender assessment to inform its bilateral SPS Capacity development programmes Cassandre Nonque; French Ministry of Economy and Finance, 2022 Annual Report

The STDF's gender assessment has provided useful insights to inform ongoing work by WOAAH to develop organizational work on gender. Gillian Mylrea, 2022 Annual Report

STDF's Gender Assessment and Gender Action Plan has pushed and enabled COLEAD to move forward on gender mainstreaming, helping us promote inclusion in a tangible way in COLEAD's work. Jeremy Knops, General Delegate, COLEAD, 2022 Annual Report

³⁷ These include the STDF's Practitioner Groups as well as other learning networks supported directly and indirectly by the STDF.



resources and regulations do not affect all groups equally; therefore, explicit consideration of equity in scaling decisions may be necessary.

Mechanisms for tracking mainstreaming goals: Without systems to track whether scaling is being mainstreamed, actors cannot assess progress or make informed adjustments. However, the STDF has not yet decided if it wants to mainstream scaling. Therefore, it is reasonable that it does not currently have an approach to tracking its progress towards mainstreaming scaling.

Summary and implications

Current actions to support scaling: The STDF supports the localization agenda by encouraging engagement with national and regional bodies as a pathway to scale.

Misconceptions and barriers to scaling: Although the STDF has committed to scaling in its strategy, there remains a need for leadership in developing a plan that clarifies the options and methods to mainstream scaling within the partnership.

Transformational change opportunities: A clear decision from the Policy Committee and Working Group regarding the STDF's strategic stance on scaling could empower the Secretariat to make some of the incremental changes discussed elsewhere in this report. The Working Group could consider inclusion of a specific agenda item on scaling in its meetings to provide an ongoing space for regular dialogue on scaling opportunities.

Constraints, challenges, and opportunities to scaling

Scaling SPS solutions is central to STDF's catalytic mechanism of change. Supporting the widespread adoption and long-term sustainability of proven approaches may allow limited funding to address a meaningful share of unsafe trade and achieve lasting results. While scaling is complex, the benefits of embedding it into STDF's work are clear: a systematic approach to scaling can **amplify the impact of existing investments, improve value-for-money, and position the STDF as a key contributor to global trade and development goals.**

Mainstreaming scaling is the pathway to developing this systematic approach to scaling. Structural constraints and evolving challenges limit how far and fast the partnership can move. A **measured approach** — starting with incremental improvements and considering transformational change — can accelerate sustainable impact at scale. By aligning incentives, institutionalization, and post project continuity, STDF can support its investments, driving **lasting change in global trade safety and compliance.**

The following sections review the structural constraints, evolving challenges,³⁸ and strategic opportunities that will determine whether and how STDF can successfully mainstream scaling.

Constraints

The STDF's capacity to mainstream scaling is limited by structural constraints that restrict its ability to move from pilots and best practices to broad uptake. These are **context-driven realities, not failings**, and represent known barriers that must be addressed if the STDF chooses to mainstream scaling.

³⁸ Constraints are viewed as realities that the STDF must work within while challenges represent tradeoffs and evolving problems that the STDF will need to dynamically navigate.



Collectively, they define the operating envelope for any future scaling strategy, which will require targeted adjustments in capacity, processes, and partnerships rather than a wholesale mandate shift.

Small Secretariat and limited resources: The STDF operates with a **small Secretariat of nine full-time staff** and a few temporary personnel. This lean structure successfully manages grants, knowledge products, and coordination across multiple workstreams but leaves **very little dedicated staff** resources or budget for scaling.

Dependency on partners: Partnerships are a key component of scaling, but relying on partners reduces a group's control over its own outcomes. The STDF's catalytic model relies on grantees, Working Group members, and external donors to carry successful pilots into wider adoption. Once a project closes, the **next step is generally considered the grantee's responsibility**, with the Secretariat sometimes facilitating introductions but rarely leading follow-through at the project level. This creates **gaps in ownership** and can leave promising innovations without a clear scaling pathway. Nonetheless, STDF Secretariat management often follows-up with key strategic partners to facilitate introductions and support the adoption of closed STDF grants.

Fragmented approach and lack of common language: While STDF has achieved some notable scaling outcomes, these have occurred *ad hoc*, without a formal scaling framework. **Scaling is often conflated with sustainability or spillovers**, and there is **no agreed definition or common language**. This results in **inconsistent activity design, limited signalling to grantees, and uneven donor and Working Group engagement** on scaling.

Governance and structural limitations: The STDF's **consensus-driven governance structure**, with a Policy Committee largely removed from operational scaling decisions and a Working Group that meets semi-annually, limits its ability to **act quickly on scaling opportunities**. If the Working Group is able to provide clearer practical agreement, the Secretariat might be able to pursue scaling more proactively. The voluntary nature of Working Group participation and the lack of formal follow-up mechanisms reduces the STDF's effectiveness as a scaling intermediary. Mainstreaming scaling will not require a fundamental change in governance structure, but it will require a strategy that accommodates the current governance structure.

Ability to assess implementation and scaling potential: Evaluating implementation ability and scaling potential is inherently difficult for small, catalytic facilities like the STDF. With a limited Secretariat and field presence, the STDF must rely heavily on grantees' self-reported abilities and the perspectives of Working Group members. Often, the STDF funds trusted implementing partners, such as FAO and IPPC, who bring their own networks and resources for implementation and scaling. This reduces requirements for the STDF to engage in oversight and intermediary support, but also limits the types of partners the STDF engages with.

Post-project MEL and continuity gap: Systematic scaling is facilitated by **tracking and support beyond project closeout**, but the STDF conducts limited structured follow-up. While some projects are later adopted by governments or other donors, these successes are not consistently documents. Without visibility into post-project outcomes, STDF **cannot easily identify which activities are most likely to scale or actively broker follow-on support**.

Challenges

If STDF chooses to mainstream scaling, it will encounter several dynamic challenges that arise from working within its structural constraints and operating environment. These challenges reflect the **practical frictions, trade-offs, and risks** of shifting from a focus on sustainability and partnership to



scaled impact. They represent the realistic consequences of pursuing scaling in an environment of limited resources, diverse governance perspectives, and external uncertainty. Addressing them will require **incremental steps, clear prioritization, and new partnership approaches**.

Managing institutional capacity and incentives: There is an overwhelming view among STDF grantees, Secretariat staff, and Working Group members that facilitating scaling is “someone else’s job,” resulting in no one taking ownership of scaling. While there is significant variation, grantees often think the Secretariat and Working Group should facilitate scaling. The Secretariat thinks grantees should be responsible for scaling. And, Working Group members often think that the Secretariat, and to a lesser extent grantees, should be responsible for scaling. Mainstreaming scaling requires **dedicated time, skills, and incentives** for Secretariat staff, Working Group members, grantees, and external experts. Currently, project managers are not resourced or incentivized to pursue handoffs or post-project follow-up. Without clear role definitions, capacity building, and additional resources, attempts to drive scaling risk overloading the small Secretariat.

Balancing innovation and scaling: The STDF’s new strategy repeatedly pairs innovation and scaling, but the STDF will need to balance the extent to which its innovations are developed with the intention to scale. The STDF’s mandate to fund pilots and innovative approaches can sometimes **conflict with the requirements for sustainable scaling**. Highly innovative projects, such as P-IMA and ePhyto, often require specialized expertise, infrastructure, or local institutional capacity and financial resources that takes time to develop and/or maintain and sustain. The STDF will need to balance its role in **testing new ideas** with realistic pathways for **institutionalization and adoption** by countries or partner organizations.

Working Group engagement and handoffs: The Working Group has strong potential to serve as an **intermediary for scaling**, connecting successful pilots to larger donors and implementers. However, current handoffs are informal and dependent on personal networks. Moving toward systematic scaling will involve **structured processes, clear expectations, and active facilitation** to avoid promising scale without a viable transition pathway. This will require the careful development of win-win scenarios where Working Group members directly benefit from taking on STDF-supported projects. However, the STDF will need to avoid becoming too structured or burdensome to its Working Group members, resulting in frustration and disengagement. Working Group members could be actively and creatively included in the development of engagement avenues that are meaningful for them.

Developing MEL of scaling: Scaling is inherently difficult to measure, but this should not be a reason to deprioritize scaling. The STDF’s current MEL system somewhat prioritizes outputs and outcomes. Mainstreaming scaling could be supported by defining **transformative success metrics** and approaches to measure scaling these without committing to unreasonable achievements. All activities cannot and should not be scaled, so MEL will need to set realistic targets that account for **STDF’s incomplete control over scaling**.

Navigating an evolving external environment: Rising **protectionist sentiment and constrained aid budgets** create uncertainty for scaling trade solutions. At the same time, global priorities are shifting toward **mobilizing private and blended finance** for development, as highlighted by Financing for Development (FfD4)³⁰ and the WTO’s Aid for Trade Initiative.³¹ STDF will need to align its catalytic role with changes in the external environment, convening stakeholders in the new funding architecture and motivating their investment in scalable solutions.



Opportunities

STDF has significant opportunities to enhance its role in scaling SPS solutions (see table in [Executive Summary](#)). Some of these opportunities represent **incremental, pragmatic, low-risk adjustments**, which fit within current resources and structures and could enhance STDF's catalytic impact. Other opportunities would require **transformative change**, such as expanded capacity, mandate evolution, or new financing approaches, and would position the STDF as a recognized intermediary for scaling SPS solutions.

The STDF's planned financing study represents a concrete change opportunity that is already in progress. It could attempt to identify opportunities for alignment between the financing needs outlined here and the external financing environment.

Incremental change opportunities

Clarifying a definition of scaling: A clear, STDF-specific definition of scaling could align expectations internally and externally. This definition would guide project design, donor communication, and MEL. By establishing what “scaling” means in the STDF context, the partnership can focus on supporting realistic pathways to broader impact without overcommitting resources or promising outcomes it cannot directly control. A possible definition for scaling within the context of the STDF could be:

facilitating the adoption, expansion, and sustainability of successful SPS solutions so that they meaningfully reduce unsafe trade beyond the STDF Secretariat's direct support.

Enhancing grant application processes for scaling: STDF project managers already engage extensively with applicants in the design of their projects and through project preparation grants. This engagement could embed a scaling mindset. **Coaching and training** could be provided to project preparation grant recipients to help them proactively think about scaling during their application development. Indirect scaling questions during the project grant application process — such as identifying potential next steps, value chains, and market opportunities — could prepare grantees to think proactively about uptake and transition without creating barriers for smaller or less experienced applicants. The STDF may also wish to preferentially fund projects with characteristics that were perceived to lead to better scaling outcomes (see section on [Scaling of STDF Projects](#)). These **incremental adjustments could improve project readiness for eventual scale without requiring major structural changes.**

Structured data on successful scaling: Many STDF projects and knowledge products have achieved scaling, but these outcomes are **under-documented and under-leveraged**.⁵ This results in a perception that the STDF achieves scale less frequently than it actually does. Developing a structured repository of case studies, knowledge products, and scaling pathways would consolidate information in a single, analysable format. This could include a table summarizing each activity, its scaling outcomes, and a short 1-2 page write-up. Unlike existing project closeout reports or policy briefs, the repository would provide **aggregated, comparable data** to identify crosscutting lessons. By systematically highlighting how uptake was achieved, the STDF could strengthen its catalytic positioning, enhance donor engagement, and guide future applicants and Working Group members toward activities most likely to scale. While comparable data may not be available for all historical projects, a comprehensive stocktaking is likely to surface useful information and comparable data could be collected prospectively.

Integrating scaling into core processes and MEL: Mainstreaming scaling would require **further advancing MEL priorities from outputs and reach to transformative outcomes** and longer-term



impact, building on what was done in the previous MEL framework. Establishing realistic, evidence-based metrics for scaling success would allow the STDF to track its catalytic role and demonstrate added value to external stakeholders. Embedding scaling considerations in project selection, closeout workshops, and follow-up reporting would gradually build a culture that values scale without overpromising. In addition, efforts to encourage grantees to collect data for the future scaling of their projects could position them well for the transition to scale.

Formalizing STDF's processes as an intermediary: Within its current structure, the STDF could define systematic processes for handoff and matchmaking between STDF projects, donors, private sector actors, and regional stakeholders. These already occur, so the incremental change would be in defining and formalizing existing processes, not creating new ones; although, external support could be leveraged if necessary. Without additional resources, the definition and formalization process is unlikely to lead to transformative change.

Support continuous partner engagement: Rather than waiting until project closeout to actively start engaging follow-up funders, the STDF could help grantees engage donors and partners throughout the project cycle to build trust and establish buy-in. It could leverage external support and coaches as useful to fulfil this role.

Transformative change opportunities

Piloting a limited intermediary role: STDF can test a proactive approach to scaling by piloting a small intermediary function, such as hiring a temporary Scaling or Partnership Officer or contracting a third-party broker. This role would focus on a handful of high-potential projects, actively supporting handoffs, matchmaking, and transition planning. This could initially be factored into project budgets. Working Group members who advocated for projects during the approval process could be asked to become "scaling sponsors" at closeout. Sponsors would not need to directly fund scaling, but would be asked to leverage their networks to facilitate scaling. A pilot would allow the STDF to assess the resource requirements and benefits of a more active role in scaling before deciding whether to mainstream such responsibilities.

Investing in scaling capacity: Mainstreaming scaling would ultimately require some combination of increased staff capacity, specialized expertise, and clear incentives for scaling and partnership management. This could include adding dedicated staff (see above), providing targeted training, or outsourcing specialized coaching and handoff support to third-party providers. While resource-intensive, this step would transform STDF into a more active driver of sustainable scale.

Mobilizing external financing for scaling: The global development finance environment offers opportunities for the STDF to link its catalytic work with larger funding flows. By presenting its successful pilots as "ready-to-scale," STDF may attract follow-on investment and position itself within the new funding architecture, achieving greater impact without a proportional expansion of its own budget. However, this would require a shift in the STDF's positioning to one more focused on securing transition to scale funding for its grantees, rather than simply developing pilots and returning them to grantee-ownership. The STDF's planned financing study may consider including this in their analysis.

Post-project continuity funding: Rather than continuing to fund the implementation of projects after grants close, the STDF could consider bridge funding to support a champion in advocacy, outreach, and fundraising activities as they seek the next phase of funding for a project. This would not be conceptualized as follow-up funding, but as transitional support. It would avoid project champions being immediately re-assigned to other work, and may give them the runway necessary to secure a next phase of funding.



Lessons learned

Although the STDF is a unique partnership, with a unique structure and mandate, its experience can provide useful insights for other catalytic groups in international development. When combined with our experience from other case studies, the STDF's experience highlights the importance of:

Consistent terminology and using the definition end-to-end. Ambiguity between sustainability and scalability complicated grant review discussions and strategic decisions. Other key terms to define and strategically position may include pilot, project, and innovation. Adopting a customized definition and applying it across concept notes, reviews, closeout, and MEL can facilitate communication.

Making intermediation explicit and resourced. With a catalytic mandate and small Secretariat, STDF's highest-leverage role is likely in brokering relationships, aligning efforts, and amplifying results, not directly funding large-scale implementation. Formalizing this role through dedicated process, staffing, and partners can reduce *ad hoc* efforts and accelerate uptake.

Turning the Working Group and advisory bodies into systematic engines for scaling. Working Group members regularly identified synergies during reviews, but follow-up is limited and informal. Setting expectations for member-led uptake, tracking handoff actions, and using closeout presentations to source "scale sponsors" can improve continuity.

Moving partner engagement upstream and funding the "missing middle." Closeout can be too late to build trust for follow-on finance. Supporting scaling plans, budgeting for continuous donor engagement, and adding short, time-bound bridge funding for a post-grant champion can sustain momentum.

Aligning culture and incentives so scaling is someone's (or everyone's) job. Responsibility is diffuse across the Secretariat, grantees, and Working Group members, and project managers are not resourced for handoffs. Setting realistic targets and assigning clear roles can make scaling actionable.

Measuring scaling. The last MEL framework referenced scaling but cross-cutting analysis has not yet identified characteristics of projects likely to scale or monitored transformational scaling. Clarifying and aggregating scaling metrics and building a repository of post-grant uptake and financing can enable portfolio-level analysis.

Selecting projects for scalability. Scaling is perceived to be influenced more by relevance to local supply chains, donor alignment, credible beneficiaries, and strong communication than by grant size. Embedding these factors in screening and coaching can improve selection and positioning.

Adopting adaptive management and flexible funding. Scaling requires strategic design modifications and the ability to reallocate funding to leverage emerging opportunities and overcome delays. Providing flexible instruments and decision windows can keep promising efforts on a scaling trajectory.

Designing for scalability from the outset. All activities need to balance testing new ideas with creating realistic pathways for institutionalization and adoption. Building in explicit pathways, partners, and capacity requirements can make widespread uptake feasible.

Appendix 2 provides a selected set of resources on measuring scaling, scalability assessments, and additional scaling theory for groups interested in turning these lessons learned into concrete actions.



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Appendix 1: Methods

Interviews

Interviews lasted about one hour and were guided by a pre-defined set of questions, but they were intentionally conversational and semi-structured. Most interviews were recorded and transcribed; however, two in-person interviews could not be recorded and were documented through notes. Participants were asked about:

1. How the STDF's approach to scaling has evolved over time?
2. What the STDF currently does in the pursuit of scaling?
3. What are some factors that facilitate or inhibit scaling?
4. How could the STDF better support scaling in the future?
5. What barriers are likely to emerge if the STDF were to mainstream scaling?
6. If the STDF should mainstream scaling?

Document review

Table A1: List of documents reviewed

Document	Review status
Ex Post Evaluation of ePhyto Solution: Enhancing Safe Trade in Plants and Plant Products	Reviewed in brief
Voluntary Third-Party Assurance (vTPA) Programme Assessment Tool	Reviewed in brief
External Learning Assessment: Environment Biodiversity & Climate Change	Reviewed in brief
STDF Gender Action Plan 2023-2025	Reviewed in full
Making "SMART" SPS Measures: Using GRPs to Facilitate Safe Trade	Reviewed in brief
Good Regulatory Practices to Improve SPS Measures: A Practical Guide	Reviewed in brief
Driving Safe Food Trade in the Midst of a Food Crisis in Africa	Reviewed in brief
External Assessment: Use of STDF's Evidence-based Approach to Prioritize SPS Investments for Market Access (P-IMA)	Reviewed in brief
Prioritizing SPS Investments for Market Access (P-IMA)	Reviewed to appendixes
Partnering with the Private Sector: Delivering SPS Outcomes	Reviewed in brief
Driving Knowledge on Food Safety, Animal and Plant Health: SPS Capacity Evaluation Tools in Action	Reviewed in brief
External Evaluation of the Standards and Trade Development Facility	Reviewed in full



2021 Annual Report	Reviewed in brief
2022 Annual Report	Reviewed in brief
2023 Annual Report	Reviewed in full
20 Years of Safe Trade for Sustainable Development	Reviewed in full
Communications Plan 2020-2024	Reviewed in full
STDF Results Matrix	Reviewed in full
Monitoring, Evaluation and Learning Framework	
STDF Operational Rules	Reviewed in full
STDF 2025-2030 Strategy: Facilitating Safe Trade to Meet the Global Goals	Reviewed in full
STDF Project Preparation Grant (PPG) Application Form	Reviewed in full
STDF Project Grant (PG) Application Form	Reviewed in full
Projects reports and fact sheet templates.docx	Reviewed in brief
Project Preparation Grant Application (WG assessment template)	Reviewed in full
Project Grant Application (WG assessment template)	Reviewed in full
Strengthening SPS Systems to Mitigate and Adapt to Climate Change	Reviewed in brief
Trade Spillover Effects: The Impact on Domestic Food Safety	Reviewed in brief
Digitalization for Safe Trade Facilitation: Driving Transformation with SPS e-Certification	Reviewed in brief
Unlocking Digital Trade: Interoperability and Data Exchange Lessons from Latin America	Reviewed in brief
Public-private Partnerships for Improved SPS Systems and Safe Trade Facilitation.	Reviewed in brief
External Assessment of Gender Mainstreaming in STDF's Work	Reviewed in brief
Guidelines for the Evaluation of Projects Funded by the Standards and Trade Development Facility	Reviewed in Full



Qualitative analysis

Qualitative coding used Dedoose is an online qualitative coding software that allows researchers to select portions of text, tag them with codes related to specific themes, and then review all text related to each theme to develop compelling summaries and narratives. The coding framework was:

- Actual scaling

 - Positive examples of scaling

 - ePhyto

 - PIMA

 - PPP

- Basic STDF understanding

- Drivers of mainstreaming

- Elements of mainstreaming

 - Analytical framework, tools, and knowledge products

 - Common language

 - Decentralization and localization

 - Dedicated share of portfolio financial resources

 - Leadership

 - Mechanisms for tracking mainstreaming

 - MEL

 - Operational instruments, policies, and processes

 - Optimal scale, equity, and inclusion

 - Organizational culture, incentives, and measures of success

 - Organizational vision, goals, and strategy

 - Partnership and intermediary function

 - Technical and budget resources for internal organizational costs

- External factors affecting mainstreaming

- Future challenges

- Mechanism of change

 - Catalyse

 - Convene

 - Innovate

 - Learn

- Opportunities

- Past challenge

- Past strengths

- Scaling journey

- Work streams

 - Convener

 - Grants

 - Knowledge products



Appendix 2: External tools and checklists

Resources	Description	URL
ExpandNet Tools and Publications	ExpandNet develops concrete tools, resources, worksheets, ect. to support scaling in the health sector. However, many of the resources are broadly applicable and would be useful for the STDF. The main website and two selected tools are provided.	• https://expandnet.net/tools/ • https://media.expandnet.net/file/root/expandnet-who-beginning-with-the-end-in-mind-2011.html • https://media.expandnet.net/file/root/ninestepsworksheets-6-1-2021.html
Education Scaling Navigator	HundrEd has aggregated a set of tools and frameworks for scaling within the Education sector. Again, many of these are broadly applicable. A specific scalability checklist tool is provided.	• https://sites.google.com/hundred.org/pilotnavigator/scaling-frameworks?authuser=0 • https://www.vvob.org/en/news/education-scalability-checklist-resources
International Development Innovation Alliance (IDIA)	Although mostly focused on innovations, IDIA provides useful tools and perspectives on taking these innovations to scale. Specific tools on AI and machine learning as well as gender and equity are provided.	• https://www.idiainnovation.org/scaling-innovations • https://www.ai-co-creation.tech/ • https://static1.squarespace.com/static/6295f2360cd56b026c257790/t/66048575659313249a47c46f/1711572346746/IDIA+-+E%261+Report.pdf
Special Issue on Scaling Science	This special issue on Scaling Science published in Agricultural Systems is sector-specific, but provides a variety of useful frameworks and approaches in addition to specific case studies.	• https://www.sciencedirect.com/special-issue/108MNO3QF2N
CGIAR Scaling tools	While not aggregated in one place, the CGIAR has a variety of interactive tools for scalability assessments and design. Scaling Scan, Scaling Readiness Assessment, GenderUp, and a training on Innovation and Scaling are provided	• https://scalingscan.org/scaling-scan/what-is-scaling-scan/ • https://www.scalingreadiness.org/ • https://genderup.ucdavis.edu/ • https://innovationandscaling.thinkific.com/courses/innovation-and-scaling
MSI's Scaling Development Outcomes	MSI has a management framework for practitioners interested in scaling and provides a detailed set of 13 tools for scaling. This includes a scalability checklist.	• https://www.msiworldwide.com/story/scaling-development-outcomes/
Scale and Sustainability Report	Grand Challenges Canada's report provides a practical example of what reporting on scaling could look like.	• https://www.grandchallenges.ca/wp-content/uploads/2025/07/Scale-and-Sustainability-report-2022.pdf
OECD DAC Scaling Guidance	The OECD DAC provides high-level guidance to members to improve the design, implementation, and delivery model of interventions so that they can	• http://oecd.org/content/dam/oecd/en/publications/reports/2024/12/dac-guidance-on-scaling-development-outcomes_97d114d5/621810cc-en.pdf



	achieve sustainable impact at optimal scale.	
Institutionalization Tracker	Brooking's tool for tracking the institutionalization of education interventions provides an approach for measuring vertical scaling.	• https://www.brookings.edu/wp-content/uploads/2021/07/Institutionalization_Assessment_ENG_FINAL.pdf
Evaluation Guidelines and Practice of Official International Development Funders	Review of how official funders are approaching scaling in their MEL, including a discussion of best practices based on key examples.	• https://scalingcommunityofpractice.com/wp-content/uploads/2025/04/FINAL-Evaluation-Guidelines-of-Official-International-Development-Funders.pdf

