

Promoting social entrepreneurship in the Mediterranean Region

Final Evaluation Report

**MedUP! Promoting social
entrepreneurship in the
Mediterranean region**

Ref. EuropeAid/155554/DH/ACT/Multi
July 30th, 2022



arco

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Cover photo: A woman enrolled on the cash-for-work tailoring programme assembles the hand-crafted baby kits at the 'Oasis Center for Resilience and Empowerment of Women and Girls' operated by UN Women in the Za'atari refugee camp in Jordan.

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Executive Summary

MedUp! Promoting social entrepreneurship in the Mediterranean region (Ref: EuropeAid/155554/DH/ACT/Multi) is a four-years multi-country project funded by EuropeAid in 2018 and implemented in Egypt, Jordan, Lebanon, Morocco, Palestine and Tunisia.

The general objective of the project was to promote and support an enabling ecosystem for social enterprises, which are considered a valuable driver for socio-economic growth.

More specifically, the project aimed at improving the inclusiveness of the labour market especially for youth and women. MedUp! pursued three intermediary outcomes:

- 1) Increasing the engagement of policy makers and key private and public stakeholders at local, national and regional levels in order to improve legal frameworks for social entrepreneurship as well as youth and gender sensitive policies.
- 2) Improving the quality and the accessibility of the support services provided to SEs by SESOs also strengthening the coordination among the latter.
- 3) Scaling up the businesses of existing social enterprises and improve public awareness of their impact.

ARCO research centre has carried out the Mid-Term and the Final Evaluation of the MedUp! project. In particular, this report showcases the **main findings** emerging from the Final Evaluation, including comparative insights with the Mid-Term findings. The purpose is to provide the project Consortium and the Donor with **informative insights and learnings** about the results achieved by the project, as well as **recommendations** for future interventions.

A **participatory approach** was adopted by ARCO throughout all the Evaluation activities. In accordance with Oxfam IT, most of the data collection and analysis activities were carried out **remotely**, using reliable web-conferencing platforms. In addition, the Evaluators took part two project events, namely the **Peer Review Event in Brussels** (June 14th-15th, 2022), during which they carried out additional Key Informant Interviews to project stakeholders,

as well as the **Final Coordination Meeting in Florence**, Italy (June 27-29th, 2022) (→ Annex 1-Methodology & research limitations).

The qualitative and quantitative primary data collected was triangulated with the project documentation sent to ARCO by Oxfam IT in order to develop an **extensive analysis of the results of the intervention**. Overall, **34 semi-structured individual interviews** with key informants were carried out, along with **3 Structured Focus Group Discussions** (FGDs) and an **online survey** completed by **40 out of 63 MedUp! Social Enterprises**. The evaluation investigated the three levels targeted by the project:

- At the **MACRO** level, the project aimed at promoting policy and advocacy initiatives and public-private dialogue to improve regulatory and policy environments at country and cross-country levels;

- At the **MESO** level, the project aimed at supporting SESOs in improving the quality, innovativeness and outreach of their services targeting local SEs;

- At the **MICRO** level, the project aimed at assisting social enterprises in targeted countries through tailored financial and technical support as well as the dissemination of promising and successful social enterprises' experiences at national, regional and EU level.

The findings from the final evaluation confirm a **positive overall assessment** of project's contribution to the achievement of its global goal "*promoting an enabling environment in the Southern Mediterranean partner countries for the development of the social entrepreneurship sector as a driver for inclusive growth and job creation*".

Albeit project countries show different levels of SE ecosystem development, **MedUp! actions have found to be generally effective and significant at MACRO, MESO, and MICRO levels**.

The key points summarising the general Final Evaluation findings as for the project's **RELEVANCE, COHERENCE, EFFECTIVENESS, EFFICIENCY, SUSTAINABILITY** and **IMPACT** (OECD-DAC criteria) are reported below. More detailed findings are presented in the report.

RELEVANCE: Has the intervention done the right things?



In line with its pioneering multi-level feature and especially during Covid-19 era, **the project overall proved and actually increased its relevance throughout its implementation**, confirming the need for the work to be continued at all levels (**MACRO**, **MESO** and **MICRO** levels).

COHERENCE: How well did the intervention fit?



MedUp! is undoubtedly a **pioneering project** as for its **comprehensive and well-rounded multi-level design** which is coherent both with its pursued objectives and its intended **systemic approach to work on SENT ecosystems in the MENA region**.

EFFECTIVENESS: Has the intervention achieved its objectives?



Despite the ambitious project objectives and the severely challenging global and national contexts, **the project can be overall considered successful and effective**. More specifically, the project was effective with different degrees according to the intervention levels (**REGIONAL**, **MACRO**, **MESO** and **MICRO** levels) and the project countries which have, indeed, very different contexts and very different stages and features of their SENT ecosystem development. To this respect, in fact, a key outcome of the project lays in having gathered valuable and strategic knowledge, key insights and learnings on the state of the art of MedUp! countries' SENT ecosystems and key actors.

EFFICIENCY: How well were resources used?



Despite the relevant external challenges, the significant plurality of project partners, and the ambitious project design which all required much coordination efforts in terms of project management, **the overall project performance proved to be efficient**, allowing for a timely achievement of project objectives. Moreover, the partnership showcased a **good level of diversity and complementarity in terms of expertise** and, overall, a **satisfactory level of collaboration** between all project partners.

SUSTAINABILITY: Will the benefits lasts?



Overall **the project showcases good chances of having achieved sustainable outcomes** which are likely to continue even after the project end. The **MICRO** level showcases promising financial and social sustainability of supported SEs. The **MESO** level also points out promising sustainable outcomes for SENT ecosystems and key actors' ownership. The work done by the project at **MACRO** level with policy-level actors, despite being the most challenging level both for the ambitious pursued project objectives and the considerable external challenges of the local contexts, may also unfold some long-term effects in the future.

IMPACT: what difference did the intervention make?



Albeit real impact on beneficiaries and SENT ecosystems will be assessable only in the long run, data collected and analysed by the evaluators unfolds informative elements that point out a **future impact potential of the results achieved by the project**.

Index

1. Introduction	9
1.1 MedUp! project	9
.....	9
1.2 Scope of the assignment	11
BOX 1: EVALUATION PILLARS	11
2. Evaluation Findings.....	12
2.1 Relevance	12
BOX 2: LESSONS LEARNT FOR FUTURE INTERVENTIONS	Errore. Il segnalibro non è definito.
2.2 Coherence	16
BOX 3: LESSONS LEARNT FOR FUTURE INTERVENTIONS	17
2.3 Effectiveness	18
BOX 4: MAIN CONSTRAINING FACTORS FOR PROJECT EFFECTIVENESS	18
BOX 5: MAIN DETECTED OUTCOMES FOR MEDUP! SOCIAL ENTERPRISES	20
BOX 6: MAIN DETECTED OUTCOMES FOR MEDUP! SOCIAL ENTERPRISE SUPPORT ORGANISATIONS	27
BOX 7: MAIN DETECTED OUTCOMES FOR MEDUP! ENGAGED LOCAL STAKEHOLDERS	29
BOX 8: LESSONS LEARNT FOR FUTURE INTERVENTIONS	30
2.4 Efficiency.....	31
2.5 Sustainability	33
BOX 9: MAIN EFFECTIVE MEASURES FOR SEs' SUSTAINABILITY	34
BOX 10: MAIN EFFECTIVE MEASURES FOR ECOSYSTEM SUSTAINABILITY	34
BOX 11: POTENTIALLY CONSTRAINING FACTORS FOR SUSTAINABILITY	35
2.6 Impact	37
2.7 Access to finance: beneficiaries' point of view	41
3. Recommendations for future interventions	52
Annex 1_ Methodology and research limitations	58
Annex 2_ Evaluation ToR.....	70
Annex 3_ Evaluation questions & Tools.....	83
Annex 4_ Evaluation respondents	90
Annex 5_ Logical Framework	93
Annex 6_ ARCO & the Evaluation Team.....	95

Figures and Tables

Figure 0. MedUp! word cloud.....	8
Figure 1. MedUp! project Theory of Change.....	10
Figure 2. Final evaluation survey results concerning the project flexibility and ability to address SEs' needs	13
Figure 3. Perceived relevance of the networking opportunities provided by the project.....	13
Figure 4. Final evaluation survey results concerning the subgrant accessibility and staff's responsiveness .	14
Figure 5. Final evaluation survey results concerning the subgrant timing and fund amount	15
Figure 6. Final evaluation survey results concerning the use and perceived effectiveness of the subgrants.	23
Figure 7. Final evaluation survey results concerning micro-level beneficiaries' satisfaction for the exchanges and networking events organized by the project.....	24
Figure 8. Final evaluation survey results concerning the perceived positive influence of the project in improving SEs' relationships with their key stakeholders	25
Figure 9. Final evaluation results concerning the evolution of SEs' relationships, compared to the MTE scenario	26
Figure 10. Final evaluation survey results concerning SEs' satisfaction for the services offered by the SESOs in the framework of MedUp! Project.....	28
Figure 11. SEs' opinion regarding the sustainability of the benefits received from MedUp! Project.....	36
Figure 12. Final Evaluation survey results concerning the perceived project contribution to the achievement of SEs' goals	39
Figure 13. Final Evaluation survey results concerning the perceived project contribution to the achievement of gender outcomes	39
Figure 14. Final Evaluation survey results concerning the perceived project influence in facilitating SEs' access to finance, overall and by gender.....	40
Figure 15. Overview on SE respondents' business profile: business stage, business model and use of profit	41
Figure 16. Final evaluation survey results concerning the main sources of financing used by the SEs.....	42
Figure 17. Final evaluation survey results concerning the main sources of financing used by the SEs, by business stage	43
Figure 18. Final evaluation survey results concerning SEs' ability to cover all running costs with their business income	43
Figure 19. Final evaluation survey results concerning the average percentage of SEs' income provided by grants and donations	44
Figure 20. Final evaluation survey assessment on SEs' alternative actions in the absence of MedUp! grant	44
Figure 21. Final evaluation survey assessment on the financial mechanisms to which SEs would like to have better access.....	45
Figure 22. Final evaluation survey assessment on SEs' perceived easiness to access the different financing mechanisms.....	46
Figure 23. A cross-gender comparison on SEs' perceived easiness to access the different financing mechanisms.....	49
Figure 24. Final evaluation survey results concerning respondents' perception of gender gaps in SEs' access to finance	50
Figure 25. Final evaluation survey assessment on the key features that a financial product should have to be affordable and convenient for the SEs.....	51
Figure 26. Overview on the SE respondents to the final evaluation survey.....	63
Table 1. Evaluation respondents' assessment of MedUp! subgranting system.....	20
Table 2. Main detected challenges for SEs in accessing finance in the MENA region.....	47
Table 3. Main detected challenges for SEs in accessing finance in the MENA region, per type of financing source	47

List of acronyms

ARCO: Action Research for CO-development
EU: European Union
HR: Human Resources
MENA: Middle East and North Africa
MTE: Mid-Term Evaluation
PMUs: Project Management Units
RPM: Regional Project Manager
SFGD: Structured Focus Group Discussion
SENT: Social Entrepreneurship
SEs: Social Enterprises
SESOs: Social Enterprises Support Organizations
ToR: Terms of Reference
KII: Key Informant Interview
WSE: Women-Social Entrepreneurs

1. Introduction

1.1 MedUp! project

MedUp! is based on EU regional strategic view conceiving Social Entrepreneurship (SENT) as a fundamental tool in generating positive social and environmental impact for local communities, while laying the foundations for the effective empowerment of women and youth. Against this backdrop, MedUp! aims at tackling the following four main challenges present in the MENA Region:

- **Regulatory framework and policy environment in MENA region countries are restrictive and hamper the smooth development of SEs;**
- **Social Entrepreneurship Support Organizations (SESOs) are not fully able to provide adapted and innovative technical support services,** mainly due to a lack of skills, tools and effective high quality support (financial and technical) tailored to SEs' needs. In addition, they often struggle to reach SEs in rural areas;
- **Communities are not properly informed and sensitized on the positive effects** that SEs can generate in terms of economic development and of social inclusion. This is often due to a lack of a common definition and understanding of SE, its characteristics and potentialities. Moreover, communities are not fully aware of the impact that social norms and institutional barriers have in limiting gender equitable participation to the labour-force;
- **Key stakeholders at macro, meso and micro levels appear disconnected** from each other and communication flows are not smooth;
- **Women in the MENA region face tougher barriers to enter the labour-force** than in any other region globally, also due to entrenched gender norms and institutional barriers.

For all these reasons and thanks to the strong cooperation among diversified European and Southern Mediterranean partners, MedUp! project aims at ***promoting an enabling environment in the Southern Mediterranean partner countries for the development of the social entrepreneurship sector as a driver for inclusive growth and job creation (global objective).***

Figure 0. MedUp! Word cloud



Operationally speaking, this objective was pursued

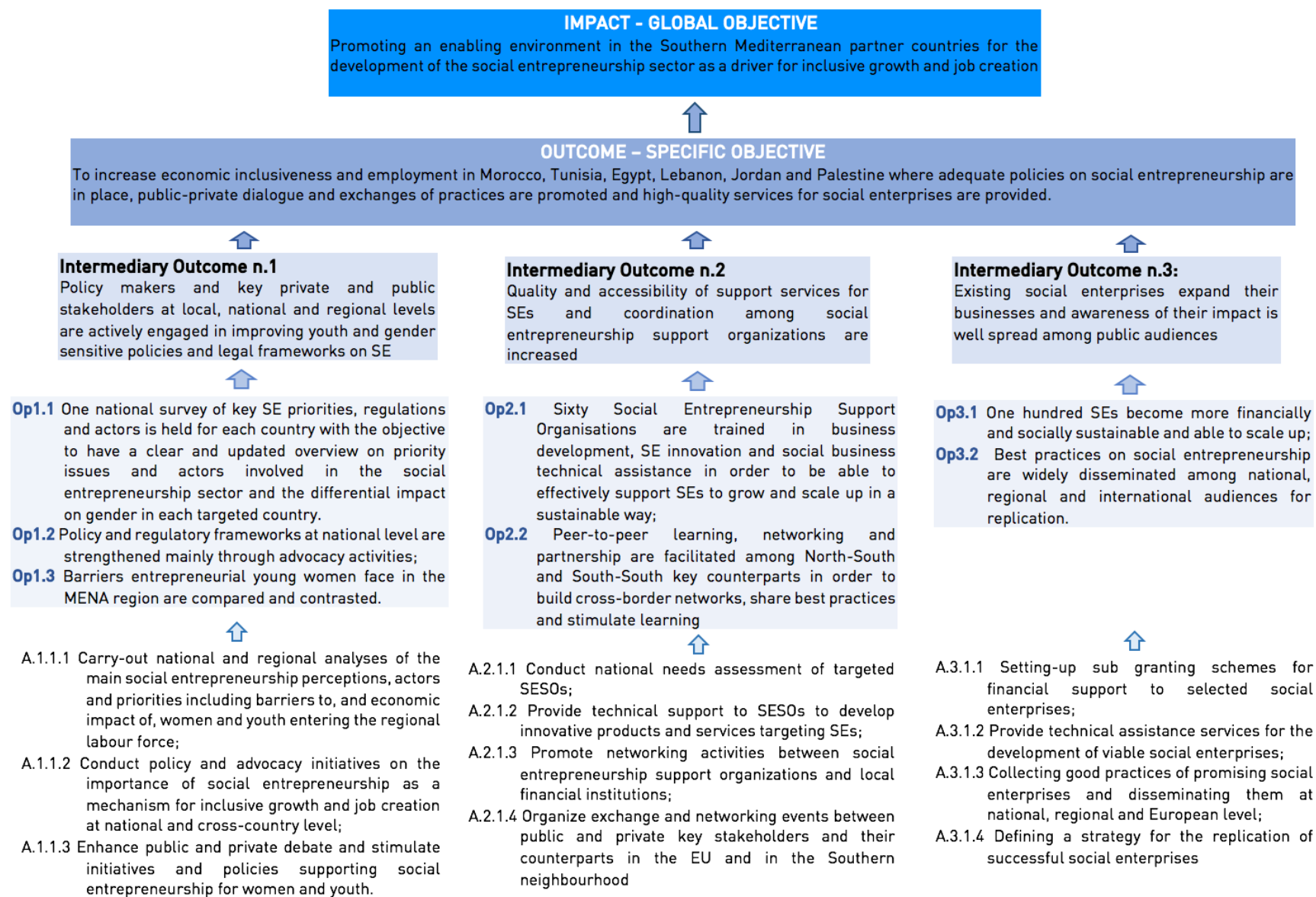
Source: Word cloud elaborated from with key words chosen by interviewed project implementors when asked to describe MedUp! project in 3 words

by MedUp! through a tailored set of activities aimed at targeting and supporting **MICRO**, **MESO** and **MACRO** level stakeholders in six MENA countries, namely in **Egypt**, **Jordan**, **Lebanon**, **Morocco**, **Palestine** and **Tunisia** (→ Figure 1).

More specifically, MedUp! contribution to the development of enabling social entrepreneurship ecosystem in the above-mentioned targeted country was pursued:

- **at MACRO level**, by promoting policy and advocacy initiatives and public-private dialogue to improve regulatory and policy environments at country and cross-country levels;
- **at MESO level**, by supporting SESOs in improving the quality, innovativeness and outreach of their services targeting local SEs. This was mainly pursued through capacity building programs, support to the creation of strategic alliances with local and international financial institutions, and the organization of exchanges and networking events with counterparts in the Southern Neighbourhood and the EU;
- **at MICRO level**, by assisting social enterprises in targeted countries through tailored financial and technical support as well as the dissemination of promising and successful social enterprises' experiences at national, regional and EU level.

Figure 1. MedUp! project Theory of Change



Source: Data extracted from project documents

1.2 Scope of the assignment

The **Final Evaluation** was aimed at providing comprehensive and detailed insights and learnings about MedUp! project, according to the key evaluation pillars already identified during the Mid-Term Evaluation (→ Box 1).

BOX 1: EVALUATION PILLARS

- ✓ **Synergies** across the entire MedUp! Consortium
- ✓ Key **engagement** of MedUp! Teams & Partners
- ✓ Data **harmonization** across countries
- ✓ **Cross- validation** of findings
- ✓ **MICRO, MESO, MACRO** and **REGIONAL** level analysis
- ✓ **Cross-sectional** Themes
- ✓ **Participatory** and self-enforcing Learning Process
- ✓ **Listening** to Beneficiaries' voices
- ✓ Quick **adaptability** to actors and circumstances
- ✓ **Mutual** learning and capitalization

Consistently with the overall scope of the Evaluation, the methodology, which is extensively described in Annex 1, was elaborated to effectively

inform about the overall accountability of the project and to provide all the relevant project stakeholders with key insights and learning to further improve the quality and effectiveness of future interventions.

Moreover, the evaluation methodology was built coherently with the 10 objectives for the evaluation reported in the Terms of Reference (→ Annex 2) for the Final Evaluation of the Project.

Overall, the Evaluation process was designed by the ARCO team as a dynamic and participatory learning process, actively involving the most important stakeholders, including project staff, partners, and beneficiaries.

The report presents the findings emerging from the final evaluation of MedUp! project. Results are structured following the **six OECD-DAC criteria analysis**. Hence, **six sections** organize our assessment as for the project's Relevance, Coherence, Effectiveness, Efficiency, Sustainability and Impact. An additional section, Section 2.7, provides an overview of the findings concerning beneficiaries' perceptions on access to finance.

Finally, the Annexes provide additional information and insights.

2. Evaluation Findings

2.1 Relevance

A RELEVANT INTERVENTION FOR ALL PARTNER COUNTRIES AND TARGETED BENEFICIARIES

In line with its pioneering multi-level feature and especially during Covid-19 era, **the project overall proved and actually increased its relevance throughout its implementation**, laying the ground and revealing the need for the work to be continued at all levels (MACRO, MESO and MICRO). In fact, the **innovativeness of the holistic and multi-level project approach** to the overall SENT ecosystems was something new and unique in partner countries. In most cases this brought relevant evidence of the inherent interconnections among these levels and calls for further future work in the SENT ecosystems of partner countries. In fact, as reported by interviewed project staff, other projects working on SENT in the area mostly focus on the MICRO level (support to SEs). This is quite coherent with the finding that, in general, MESO and MACRO level beneficiaries were generally a more challenging target to fully engage in the project activities compared to the MICRO level beneficiaries, this being consistent with the key findings of the MTE. Indeed, the extent to which the project succeeded in identifying and tackling their needs and priorities (particularly for SESOs) varies across project partner countries as the level of SENT development, indeed, is different, hence requiring greater adaptation to the specific features of the local SENT ecosystems and priorities. However, as for beneficiary SESOs, evidence of improved alignment with their priorities did emerge during the Final Evaluation.

That said, and taking into account the different national contexts, it can be stated **that overall the project pursued objectives were and continue to be relevant for all partner countries and targeted beneficiaries¹**. This is also well proven by the Donor's intention for more future support on SENT in the area drawing from MedUp! key learnings.

MICRO
level

TACKLED SE's NEEDS

As reported in Figure 2, 49 out of 50 surveyed SEs confirmed that MedUp! has either "completely" (50%) or "to a certain extent" (48%) tackled their needs. As predictable, the vast majority of the SEs

¹ This continues to be in line with the findings of the MTE. For more details see page 19-31 of the MedUp! MTE.

(67%) declared that their needs were negatively affected by the unexpected outbreak of the Covid-19 pandemic. Against this backdrop, the project overall successfully proved to be **very flexible and adaptable** to beneficiary WSE and SEs' actual needs and priorities across all partner countries (→ Figure 2). Furthermore, the networking opportunities offered by the project were perceived as "Fundamental" or "Quite useful" by the majority of SE respondents (→ Figure 3). The **subgranting** overall design, accessibility², implementation and follow-up was generally considered **inclusive and much responsive** to SEs' needs (Figure 4). As for the disbursed subgrant amount, the latter was said to be sufficient for the original purpose it was asked for by 55% of surveyed SEs, while 40% declared that a greater amount would have been necessary to more effectively pursue their goals (→ Figure 5). Moreover, for the vast majority of SEs (70%), the grant was delivered when it was most needed and, even in case of delays, few problems did arise only for a residual percentage of beneficiaries (8%) (→ Figure 5). Indeed, the relevance of the subgrant support is also made evident by the fact that access to finance was largely confirmed to be one of the major challenges for SEs in partner countries, especially for WSE and SEs in remote areas and/or SEs working with/in marginalised communities (→ **Section 2.7, Access to Finance**). Moreover, WSEs are believed to be, in some cases, even not fully aware of how much of an obstacle access to finance is for them, which makes the project objective to support also WSE specifically, even more relevant for the targeted region.

IMPROVED ALIGNMENT WITH SESOs' PRIORITIES

At **MESO** level a low commitment by SESOs was detected during the MTE especially concerning the capacity building program in the first years of the project (→ Page 22, MTE). During the final evaluation it was confirmed that, for some partner countries in particular, the capacity building topics generally required a deeper knowledge, understanding and adaptation to the local contexts and SENT ecosystems to be fully respondent to SESOs' actual needs. However, the final project evaluation found that, overall, this project component did

MESO
level

² The MTE results confirm that the selection process of beneficiary SEs was considered inclusive, with regards to geographical and gender representativity in all project countries. For more details see page 28 of MedUp! MTE.

progressively work towards an **improved and more tailored response to the targeted beneficiaries**. The successful **Peer to Growth** activity in Year 4, for example, did reveal a full engagement and commitment from participating SESOs proving the relevance of the activity for them. As for the other key project activity targeting SESOs, namely the Peer Exchanges, it was confirmed by both the interviewed beneficiaries and the project partners that they **successfully address the need for networking and exchange showcased by SESOs**. This holds true even during Covid-19, albeit the pandemic did affect such project activity which counts a great deal on in-person exchanges to foster deeper connections. As already detected during the MTE, an **untapped need** for MESO level beneficiaries is certainly the financial support to beneficiary SESOs. According to most project stakeholders, such component, which was not included in the project design, could be considered for future projects (→ **Section 3, Recommendations**).

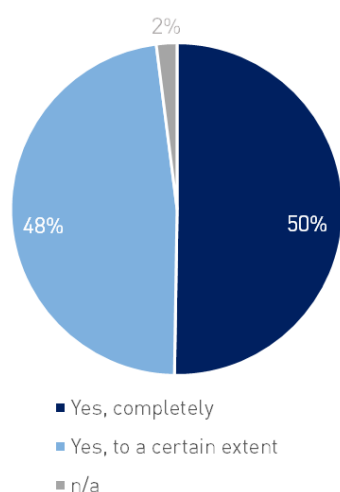
RELEVANT MACRO LEVEL OBJECTIVES

The **MACRO** level objective of the MedUp! project regarding a greater engagement of policy makers and key private public stakeholders “to promote youth and gender sensitive policies and legal frameworks on social entrepreneurship” (iOC.1) was confirmed to be relevant for all partner countries. Nevertheless, changing governments' orientation and/or severe national economic, political, and social unrest in some countries can partially explain a generally harder engagement of policy level actors in the project activities. Some respondents highlighted that a **greater adaptation to the local contexts and understanding of the different local SENT ecosystems and priorities** would have benefitted the design and implementation of MACRO level activities. Nevertheless, interviewed policy-level actors and local stakeholders did confirm the **project relevance** for their respective countries as well as their interest in the macro-level activities they were engaged in, such as Peer reviews and roundtable discussions.

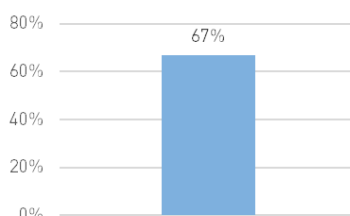
MACRO
level

Figure 2. Final evaluation survey results concerning the project flexibility and ability to address SEs' needs
Percentage distribution and clustering of the survey respondents' answers (N=40)

"Do you think that the project addressed your real needs?"



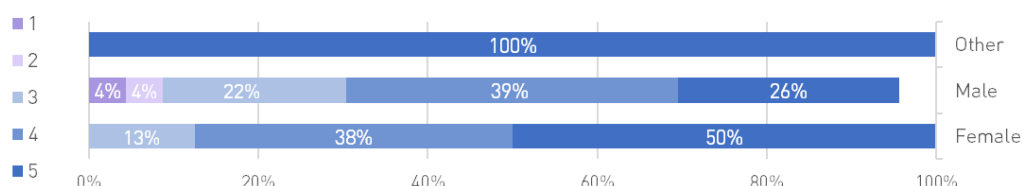
Percentage of respondents whose needs were negatively affected by the Covid-19 pandemic



Respondents' suggested improvements to increase project relevance:

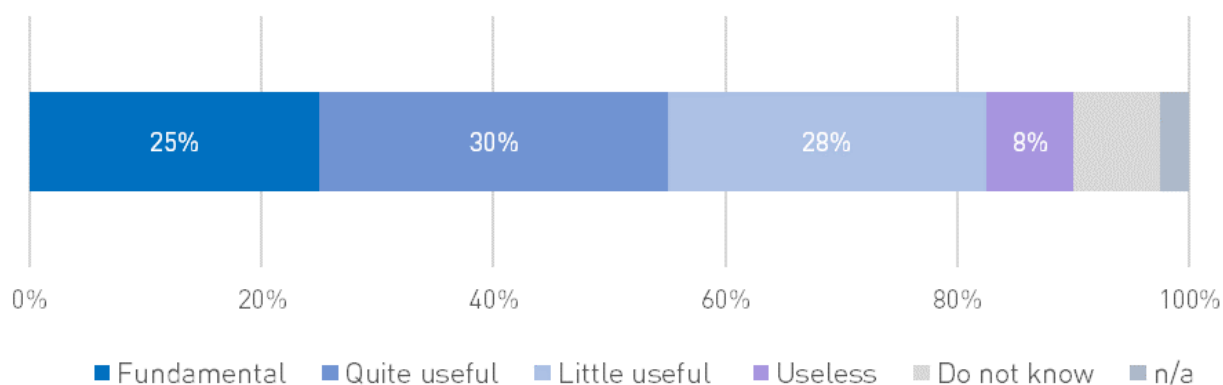
- More intense networking with investors and local stakeholders;
- Sequential rounds of grant;
- More thorough follow-up after training;
- Impact measurement system and tools;
- Focus on employees' wellbeing.

Perceived project flexibility towards respondents' personal and professional needs and duties
(5 = very flexible; 1 = not flexible at all)



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

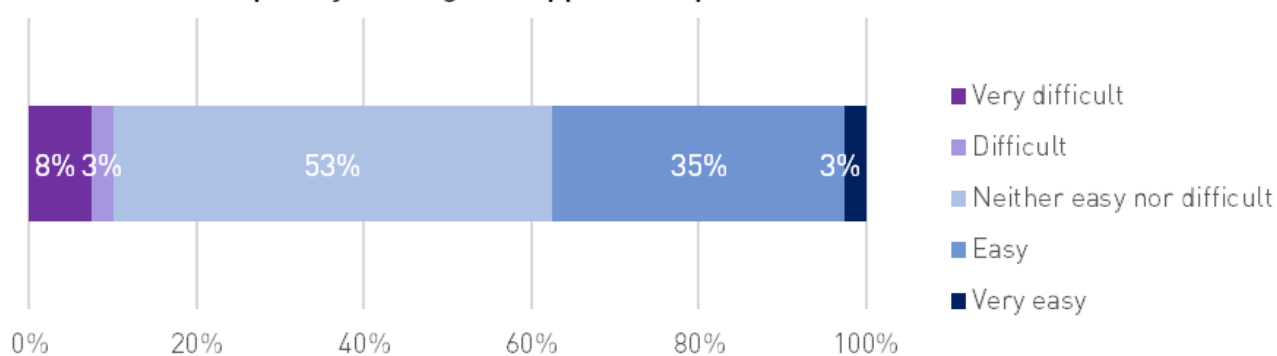
Figure 3. Perceived relevance of the networking opportunities provided by the project
Percentage distribution of the survey respondents' answers, based on the reported Likert-scale (N=40)



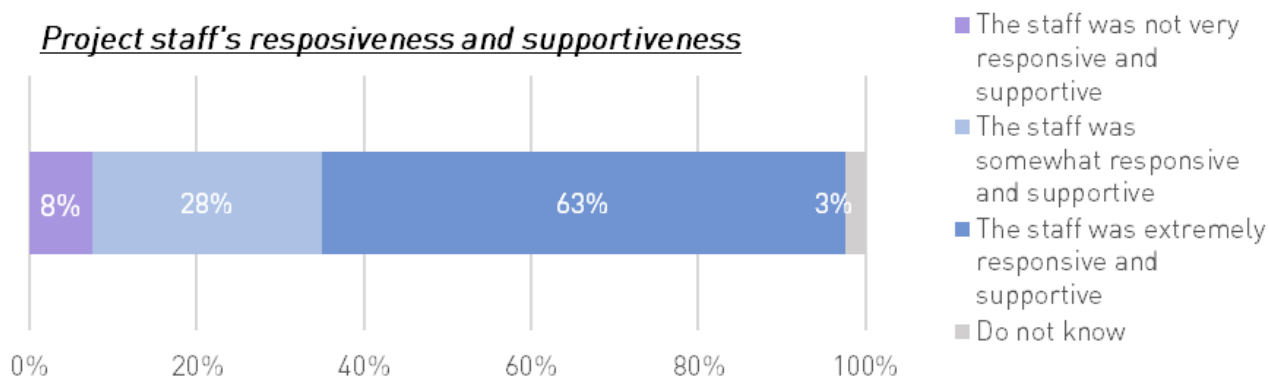
Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Figure 4. Final evaluation survey results concerning the subgrant accessibility and staff's responsiveness
Percentage distribution of the survey respondents' answers as for the reported evaluation items (N=40)

Perceived complexity of the grant application process

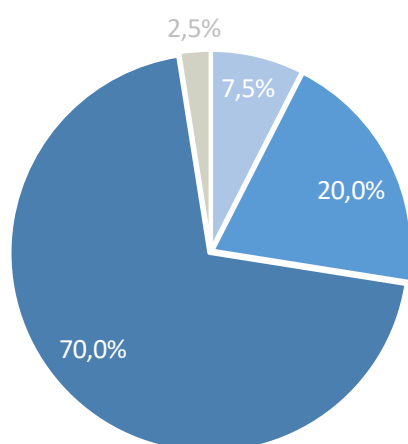


Project staff's responsiveness and supportiveness



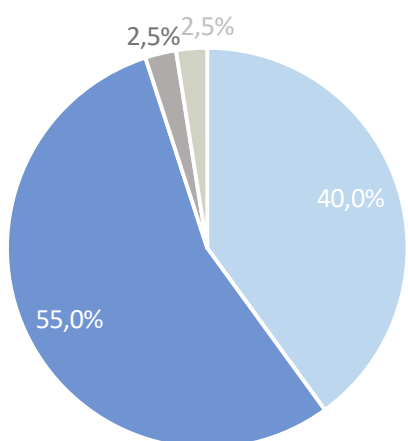
Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Figure 5. Final evaluation survey results concerning the subgrant timing and fund amount
Percentage distribution of the survey respondents' answers to the reported questions (N=40)



"Did the grant arrive when you needed it?"

- The grant arrived late and this caused some problems
- The grant arrived late but this did not cause any problem
- The grant arrived when I needed it
- n/a



"Was the grant amount you received sufficient for the purpose you had originally asked it for?"

- No, the amount was not sufficient
- Yes, the amount was sufficient
- Do not know
- n/a

Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

BOX 2: LESSONS LEARNT FOR FUTURE INTERVENTIONS

The following main takeaways were collected through the evaluation interviews to project implementors and beneficiaries:

MICRO LEVEL

- SEs greatly to benefit from one-by-one tailored business support, both concerning technical skills as well as soft skills (especially for women-led SEs)
- Technical support SEs is as much important as financial support

MESO LEVEL

- SESOs need financial support just as much as SEs do: empowering SESOs is not only about building their capacities but it is also a matter of giving them the opportunity to be financially sustainable.
- Capacity-building programs for SESOs need to be very context-specific and tailored to their needs
- Long-term commitment to capacity building programs from SESOs is challenging. Hence, condensing the trainings in a shorter timeframe at the project start, then focusing on the most engaged ones could be an effective strategy

MACRO LEVEL

- Working on the policy-level is challenging, it requires time, strong knowledge of the local culture and mainly consists of building and nurturing personal relationships with key actors

2.2 Coherence

A PIONEERING PROJECT

MedUp! is undoubtedly a **pioneering project** as for its **comprehensive and well-rounded multi-level design** which is coherent both with its pursued objectives and its intended **systemic approach to work on SENT ecosystems in the MENA region**. Indeed, the **project design is unique** for the comprehensiveness, diversity and complementarity of all its 4 levels of intervention (REGIONAL, MACRO, MESO, MICRO levels) which is a significant value-added of the project.

Other **innovative features** of MedUp! mainly remarked by the respondents were i) the **support offered to SESOs** (especially for those countries where SESOs are hardly targeted by national and international support programs), both for the international networking component and, especially, for the successful Pair to Growth activity, and ii) the **extensive technical and financial support provided to the targeted SEs**, including smaller SEs, SEs involving PwDs, SEs placed in rural areas and in marginalised communities as well as women-led SEs.

CONSISTENT AND AMBITIOUS PROJECT DESIGN

The **project activities, outputs and outcomes were consistent with the overall goal and the attainment of the project objectives**. As the latter were undoubtedly ambitious, the **project design** inevitably resulted in a **rich ensemble of components and a large number of project activities** across all 6 project countries and all 4 levels of implementation (micro, meso, macro and regional). In view of some respondents, **greater connections** across intervention levels and activities would have benefitted the project design, albeit understandably this not being simple to materialise in the project implementation due to the highly heterogeneous pool of stakeholders and contexts targeted by the project as well as the articulate project architecture.

A CHALLENGING TRANSVERSAL GENDER COMPONENT

Against this backdrop, the **cross-cutting gender-equality and empowerment** project component, albeit comprehensively designed as a **transversal objective**, resulted challenging to translate into defined, clear and coherent actions across countries and across the vast array of project activities at all

different intervention levels, particularly when delving at **MICRO** and **MESO** levels. Conversely, a greater gender transformative approach³ requires a step back from the risk of standardised assumptions such as that contributing to women empowerment can be limited to providing them with job opportunities, without tackling the overall structural multi-dimensional challenges they face. As the latter are, indeed, country-specific, a greater **tailored country specific perspective** would have benefited the project design according to some respondents. Furthermore, it was remarked that the project design could have planned for a more **intensive capacity building for project implementors** ensuring greater awareness, knowledge and the tools to properly identify and tackle gender issues in all the project activities at all levels of the project implementation.

INTENSE HARMONISATION WITH OTHER EXISTING ACTIVITIES

The project **successfully interlaced and strongly collaborated with a plethora of other interventions** in the region sharing similar objectives, whether other Oxfam programs, EU-funded or international programs, and local initiative⁴. In line with its pioneering feature, MedUp! provided **key learnings** that have (and will continue to do so) strategically informed other projects in the region⁵: this is the evident case, for example, of MedUp! subgranting methodology which was extensively shared with other ongoing initiatives.

DIFFERENT SENT PRIORITIZATION ACROSS MEDUP! COUNTRIES

The MTE findings already confirmed MedUp! **alignment with national strategies**, albeit not all MedUp! countries explicitly encompass SENT in their national agendas (→ MTE, p.39-45). Where present (i.e., in Tunisia), the project was found to be fully consistent with the national policy framework on SEs. Moreover, as stressed by respondents, while the unstable and challenging political, social and economic contexts dimmed, at times, governments' attention to SENT, **MedUp! overall coherently responded, to various degrees, to an existing and growing interest over SENT by project countries' societies and SENT ecosystem players**.

³ Source: MEDUP Gender Transformative Approach presented by The Gender Justice Team at the MENA Regional Platform (22.07.2019)

⁴ Figure 6 of the MTE provides a detailed overview of the synergies that MedUp! pursued with MENA region projects and initiatives. In the following 2 years of the project many further synergies were fostered with other existing activities such as "ECOSYS+" in Egypt, "EU MADAD"

and "SEE Change" in Lebanon, "FLAG: Femmes, Leadership, Appui et Gestion" in Tunisia, and "MedSt@arts" in Palestine.

⁵ This is the case, for example, of MedUp! learnings which are informing the "Trait d'Union" project implemented in Tunisia, led by the Tuscany region (Italy) and financed by the Italian Ministry of Interior.

ALIGNMENT WITH THE EU COMMISSION PRIORITIES & SDGs

Finally, albeit there is no current common SENT agenda for MENA region countries, both MTE and the final evaluation results confirm that MedUp! is **conformed to the EU cooperation strategy in the MENA region** (→ MTE, p 37-39) which sees SENT as playing a crucial role in responding to social and economic challenges. SENT continuing to be a priority for the EU Commission is also well confirmed by the newly adopted European Action Plan *“Building an economy that works for people; an action plan for the social economy”* (2021-2030). The Plan proposes 38 concrete measures to be implemented in the coming nine years, in different core areas, including promoting social economy at local, regional, and international levels.

Moreover, MedUp! project is both directly and indirectly **contributing to the achievement of SDGs**. While directly promoting SDG 8 – “Decent Work and Economic Growth”, SDG 5 – “Gender Equality”, SDG 10 – “Reduced Inequalities” and SDG 17- “Partnership for the Goals”, the project is indirectly contributing to a larger set of goals pursued by the supported SEs (→ MTE, Table 19, p. 45-46).

A WELL-ALIGNED CONSORTIUM

Findings from the MTE confirmed the strong conformity of MedUp! project with the vision and mission of all partners’ organization (→ MTE, Table 8, p. 32-34). Such alignment was confirmed also during the Final Evaluation.

BOX 3: LESSONS LEARNT FOR FUTURE INTERVENTIONS

- A gender transformative approach requires a tailored country specific perspective in the project design as well as planning for a preliminary and intensive capacity building for project implementors: gender issue is very country specific
- The absence of a shared agenda on SENT in the MENA region as well as the heterogeneity of national context and legal frameworks, challenges the pursuance of a regional impact
- A multi-level approach is an effective strategic project set-up to promote the creation of enabling ecosystems for SEs. However, promoting the interconnections and synergies across levels may be challenging.

2.3 Effectiveness

AN OVERALL SUCCESSFUL PROJECT

Despite the ambitious project objectives and the severely challenging global and national contexts (→ **Box 4**), **the project can be overall considered successful and effective**. More specifically, the project was effective with different degrees according to the intervention levels (REGIONAL, MACRO, MESO, & MICRO) and the project countries which have, indeed, very different contexts and very different stages and features of their SENT ecosystem development. To this respect, in fact, a key outcome of the project lays in having gathered valuable and strategic knowledge, key insights and learnings on the state of the art of MedUp! countries' SENT ecosystems and key actors. The latter may have indeed, positive effects also on the overall sustainability, impact and scalability of MedUp! project.

BOX 4: MAIN CONSTRAINING FACTORS FOR PROJECT EFFECTIVENESS

EXTERNAL FACTORS:

- Covid-19, affecting all countries and levels of the project intervention
- Brexit generating uncertainty as for the legal commitment of Oxfam Great Britain in target countries, namely Lebanon and Jordan

CONTEXTUAL FACTORS:

- Very different national context and SENT ecosystem stage of development
- Severe national political, economic, and social unrest
- Cultural & social norms and societal power relations hindering gender equality and empowerment
- Challenging access to finance for SEs
- Lacking cultural awareness on SENT
- Absent legal frameworks for SENT
- National unstable governments' and changing interest & commitment to SENT
- Absence of a MENA regional body and low level of integration between MENA countries
- Heterogeneity of supported SEs' business size, legal forms, business sectors
- Hard-to-reach long-term commitment from SESOs

INTERNAL FACTORS:

- Significant PMU staff turnover

Overall, the **MICRO** level has been, indeed, the **most successful** one for all countries, as an effective support was provided to beneficiary SEs whose economic and social performance has been enhanced (→ **Box 5**).

MICRO
level

At the **MESO** level, the project has positively set a **milestone** in testing and preparing the ground for future work on the SENT ecosystems in all countries, contributing to increasing the **awareness of SENT ecosystems** of their stakeholders and building a **common space** for them to **connect** and **dialogue**. Positive outcomes for beneficiary SESOs, key targets of the MESO level project activities, have indeed been detected as for an increased SE-specific know-how and wider networks (→ **Box 6**).

MESO
level

The **MACRO** level ambitious outcomes revealed to be the hardest one for all countries to achieve, greatly challenged, particularly for some countries, by **restless political turnover and unstable governments' commitments to SENT agenda** (→ **Section 2.1, Relevance & Section 2.2, Coherence**). This, in general, was reported to have inhibited the project efforts in building and maintaining steady personal relationships with policy-level actors. Albeit the project effectiveness at this level is harder to assess since policy changes require a longer timeframe to occur and be assessed, the project advocacy efforts were said to have potentially led to some flourishing connections with macro-level actors, which may, in the long run, trigger positive effects on the national SENT ecosystems (→ **Section 2.6, Impact**). Furthermore, all interviewed policy-level actors and key local stakeholders engaged in the project activities positively assessed the macro-level initiatives, primarily Peer reviews, roundtables and project events they participated to (→ **Box 7**).

MACRO
level

As stressed with reference to the Relevance and Coherence Sections, the **REGIONAL** level effectiveness appears to be hard to assess primarily because the project partner countries have **very different national contexts** and hardly integrated under a common regional characterisation. Indeed, there is **no regional body** for the project to interact with, nor to target for advocacy outreach. Moreover, the project relevance, efficiency, effectiveness and sustainability all call for and required a decentralized project governance and a **multi-country implementation** more than a regional one. Nevertheless, the project was said to have brought a **pioneering regional added value** in that it has fostered some degree of connections and mutual exchange both between project implementors and project beneficiaries across countries. That said,

REGIONAL
level

many respondents would have wished for stronger international exchanges throughout the 4 years (especially between SEs and SESOs across project countries). To this respect, Covid-19 greatly hindered greater regional connections throughout the project lifetime.

POSITIVE GENDER OUTCOMES

Overall, at regional and macro levels, satisfactory and informative gender-focused research and gender advocacy plans were carried out, as well as a successful documentary which is expected to positively contribute to gender advocacy in all countries by giving visibility to WSEs' success and challenges. In addition, results from the evaluation survey confirm **positive outcomes concerning women leading and working in the targeted SEs**. Such positive outcomes, especially in terms of enhanced skills, greater active involvement and stronger decision-making power and greater ability to access financial resources, lead to encouraging expectations for a potential gender impact generated by the project (→ **Section 2.6, Impact & Section 2.7, Access to Finance**). Furthermore, results from female respondents to the evaluation survey showcase a substantial support from the project in improving targeted women's relationships with stakeholders, particularly with their customers and users, SESOs, other SEs and, remarkably, with their families (→ Figure 8).

MAIN DETECTED OUTCOMES FOR MEDUP! SOCIAL ENTERPRISES

Intermediary Outcome n.3:

Existing social enterprises expand their businesses and awareness of their impact is well spread among public audiences

“ MedUp! was a boost for us, it kept us going even though COVID was spreading. This project taught us how to shift our thinking sometimes, apply things differently, and how to scale up a project

within such circumstances ”

Interviewed MedUp! beneficiary SE

The effectiveness of MedUp! support to beneficiary SEs is generally confirmed by the survey findings and consistent with those emerging from the MTE⁶. More specifically, survey results confirm that the MedUp! grant was either “fundamental” (48%) or “quite useful” (38%) to improve SEs' business performance (→ Figure 6). In fact, the grant was mainly used by SEs for capacity building and training (63%), to purchase tools and equipment for marketing (60%) and tools and equipment for their businesses (58%) (→ Figure 6). Moreover, MedUp! support was assessed either “fundamental” (35%) or “quite useful” (50%) for SEs to help them pursue their social/environmental goals (→ **Impact**, Figure 12).

In addition to the subgranting support, 84% of the surveyed SEs declared to be “extremely satisfied” or “satisfied” of the networking and exchanges opportunities that the project offered them (→ Figure 7). Consistently with this finding, survey results detected a **significant project influence in improving SEs' relationships with their stakeholders**, particularly **customers and users, SESOs and other SEs** (→ Figure 8). Remarkably, as previously highlighted, such outcome generally resulted more evident for female respondents than their male counterparts. Comparative results with the MTE⁷ also interestingly showcase that in the last two years of the project there has been an **improvement in some SEs' relationships with SESOs and financial institutions**, connections that were an important goal pursued by MedUp! (→ Figure 9). Furthermore, compared to the feedback provided during the MTE, it was detected a 15% and 40% increase in the number of SE respondents mentioning respectively SESOs and Financial institutions as key players for their development.

Box 5 below summarises the main detected outcomes for MedUp! beneficiary SEs. These reported outcomes were identified mainly through the evaluation survey which was administered to the project beneficiary SEs as well as through the evaluation semi-structured interviews to SEs and the SFGD with representative SEs of all partner countries. Finally, Table 1 presents an overview of the subgranting mechanisms assessment, drawing from the MTE and Final Evaluation survey results and KIs to project implementors.

⁶ The comparative analysis between the SE surveys results from the MTE and final evaluation was carried out only on 26 SEs who responded to both surveys.

⁷ See previous note.

BOX 5: MAIN DETECTED OUTCOMES FOR MEDUP! SOCIAL ENTERPRISES

- Increased **SEs' self-recognition** and **self-awareness**
- Improved business performance and, for some SEs, expansion even beyond national borders (exports)
- **Improved social impact** on the community, particularly in terms of increased working skills, working opportunity (job creation) and income for enterprise staff and/or suppliers (also belonging to vulnerable categories), benefits for vulnerable clients and/or the environment (→ **Section 2.6**, Impact, Figure 12)
- **Improved exposure, visibility and relationships** with key/potential partners (i.e., other enterprises, NGOs, public organisations, SESOs) and customers mainly through the project networking events, Peer Exchanges and Pair To Growth programme, thus resulting in **greater marketing and business opportunities**
- **Increased business resilience** in challenging circumstances (COVID-19)
- **Improved opportunities for women**, in terms of their increased active participation to the enterprise day-to-day activities and decision-making power within their enterprise, increased working skills and job opportunities and increased abilities to access financial resources (→ **Section 2.6**, Impact, Figures 12, 13 and 14)

Table 1. Evaluation respondents' assessment of MedUp! subgranting system

MEDUP! SUBGRANTING SYSTEM	
How was the subgranting system designed? What are the key aspects and mechanisms related to its functioning?	<p>Overall positive assessment of the subgrant design.</p> <p>Key positive aspects of the overall MedUp! subgranting mechanism remarked by the project staff:</p> <ul style="list-style-type: none"> ✓ Negotiated budget amounts and co-financing mechanism fostering SEs' responsibility, commitment and ownership ✓ Comprehensive and holistic support to SEs, combining technical support, financial support and networking opportunities ✓ Attentive and "safe" grant disbursement strategy ✓ Grants disbursed coherently to the project objectives ✓ Flexibility and adaptability to subgrantees' needs ✓ More than sufficient implementation time <p>TAKEAWAYS FOR FUTURE INTERVENTIONS:</p> <p>Some respondents would recommend greater flexibility of the subgrant design in future intervention (i.e., giving the option to opt for multiple rounds of grants) and greater voice to the local partners in the subgrantees' final selection.</p>
Which were the eligibility and selection criteria? Why were those criteria chosen?	<p>The MTE results confirm that the selection process of beneficiary SEs was considered inclusive, with regards to geographical and gender representativity in all project countries (→ MTE, page 29-30)</p>
Was the overall system designed in such a way to ensure inclusiveness and accessibility, especially for marginalized groups?	<p>The subgranting overall design, accessibility, implementation and follow-up was generally considered inclusive and much responsive to SEs' needs (→ MTE, page 28-30)</p>

What level of commitment was required to the applicants? (e.g., in terms of co-funding, time, effort, ...)

Significant commitment was required to the subgrant applicants and subgrantees in terms of required co-funding, time and effort to follow the subgranting procedures and compliance. This was believed to have positively fostered subgrantees' commitment to their social enterprises' goals.

TAKEAWAYS FOR FUTURE INTERVENTIONS:

The required co-financing troubled some SEs at first (i.e., Lebanon, Palestine). Moreover, some respondents mentioned that reporting procedures and requirements were overly onerous for some subgrantees.

Was the subgranting system designed in such a way to be easily adaptable to SEs' needs? (disbursement timing, the volume of instalments, etc.)

Both MTE and Final Evaluation findings confirm the **flexibility and adaptability of the subgranting implementation to SEs' needs**, especially in light of disruptive external challenges, such as Covid-19 pandemic, the 2020 Beirut Port Blast and the Lebanese severe national economic, social and political unrest (→ **Section 2.1, Relevance & MTE**: page 31)

Was the governance and management structure designed in such a way to ensure the efficiency of the overall system?

Respondents overall remarked the **effective decentralized subgrant governance** managed at **country level**.

Were the implementing Partners endowed with the needed skills and knowledge to effectively design and implement the sub granting? Were there any skill gaps detected? If yes, were they properly tackle throughout the project?

Findings overall confirm that the implementing Partners were endowed with the needed skills and knowledge to **effectively design and implement the sub granting**.

TAKEAWAYS FOR FUTURE INTERVENTIONS:

Some implementors (i.e. PMU in Morocco) would recommend ensuring greater entrepreneurial technical expertise within the implementation team instead of outsourcing the SEs' technical support to external consultants. In this respect, greater supervision of the Consortium's technical partners also at the MICRO level was remarked as a recommendation to improve the subgrant implementation and follow-up.

Was the subgranting implemented in a cost-effective way? Were overall costs for the design and implementation of the sub granting (especially in terms of HR effort) well-balanced and convenient with respect to the actual disbursement rate?

Overall findings confirm a **cost-effective implementation** of the subgranting mechanism.

TAKEAWAYS FOR FUTURE INTERVENTIONS:

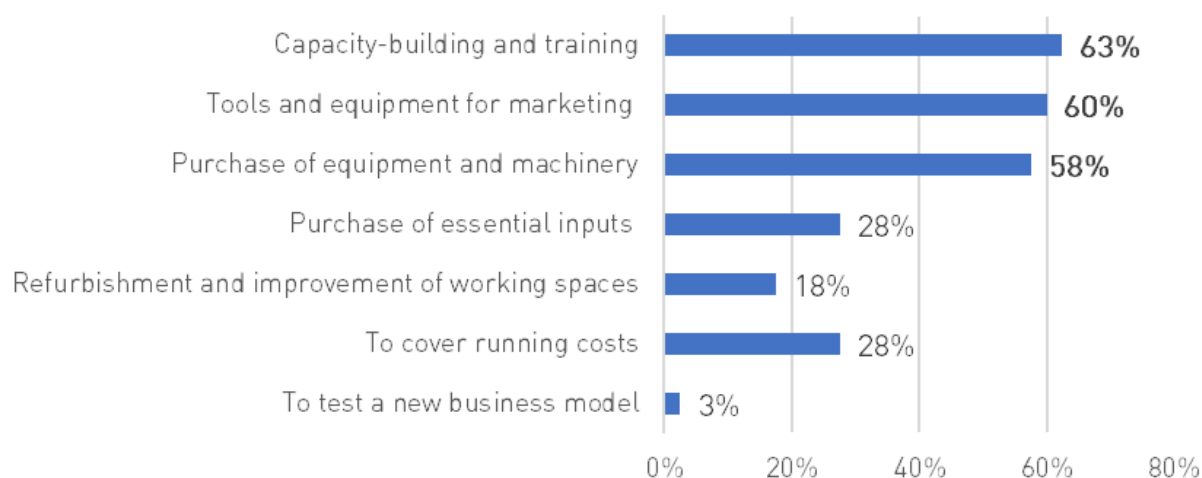
Some respondents highlighted that the subgrants monitoring was demanding for the project staff, especially for smaller SEs lacking financial literacy. It was recommended, therefore, to plan for sufficient capacity in terms of human resources in future interventions in order to adequately support such SEs to comply with financial reporting, procurement procedures and bookkeeping.

<p>To what extent was the subgranting system designed in MedUp! similar or different with respect to other subgranting initiatives implemented in the partner countries?</p>	<p>MedUp! subgranting systems was remarked as unique particularly for some partner countries.</p> <p>In Jordan, for example, MedUp! subgrant was reported as particularly innovative for the i) targeting, as the project supported also rural areas which are usually less targeted by subgranting opportunities, ii) consistent subgrant amount also for smaller SEs, coherent disbursement of funds with the project objectives, iii) close monitoring and follow-up and (iv) the combination of technical support and financial support.</p> <p>Moreover, MedUp! was reported as being the first project giving fair amount of funds for SEs in Morocco and also providing the opportunity to fund SE employees' payrolls.</p> <p>In Tunisia it was remarked that the limited number of supported SEs allowed to provide them with very tailored technical support.</p> <p>Implementors from Palestine, Lebanon and Egypt all remarked the comprehensive and holistic support to SEs, combining technical support, financial support and networking opportunities</p>
<p>Which were the main characteristics of the SEs applying to the grant?</p>	<p>Evaluation findings showcased that out of the 40 surveyed SEs, almost half declared to be in the "Growth" phase, while one-fourth said to be in the process of scaling up ("Expansion/replication").</p> <p>As for their business model, "Fee-for-service", "Employment & Skill training" and "Market Intermediary" are the most frequently applied models by the surveyed SEs.</p> <p>Among the SEs generating profit, the majority reinvest it, either completely or partially, in the organization.</p> <p>(→ Section 2.7, Access to finance)</p>
<p>Why did they apply?</p>	<p>Many interviewed respondents remarked that the MedUp! subgrant was crucial as it allowed many SEs to survive during the Covid-19 pandemic.</p> <p>Evaluation findings confirm that MedUp! subgrant was mainly used by SEs for capacity building and training (63%), to purchase tools and equipment for marketing (60%) and tools and equipment for their business (58%) (→ Section 2.3, Effectiveness)</p> <p>Moreover, during both the Mid-Term and the Final Evaluation, SE respondents were asked to provide a 0-to-5 score to rank the key priorities of their SE in the near future. The pursuance of the social/environmental mission has remained a constant priority for most SEs, both in the MTE and final survey findings (→ Section 2.5, Sustainability)</p>

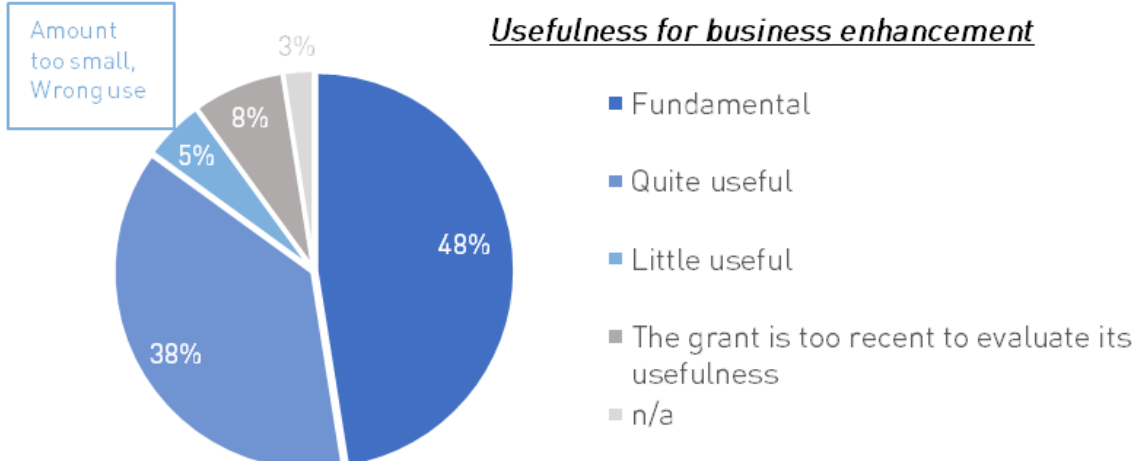
Source: ARCO

Figure 6. Final evaluation survey results concerning the use and perceived effectiveness of the subgrants
Percentage distribution of the survey respondents' answers as for the reported evaluation items (N=40)

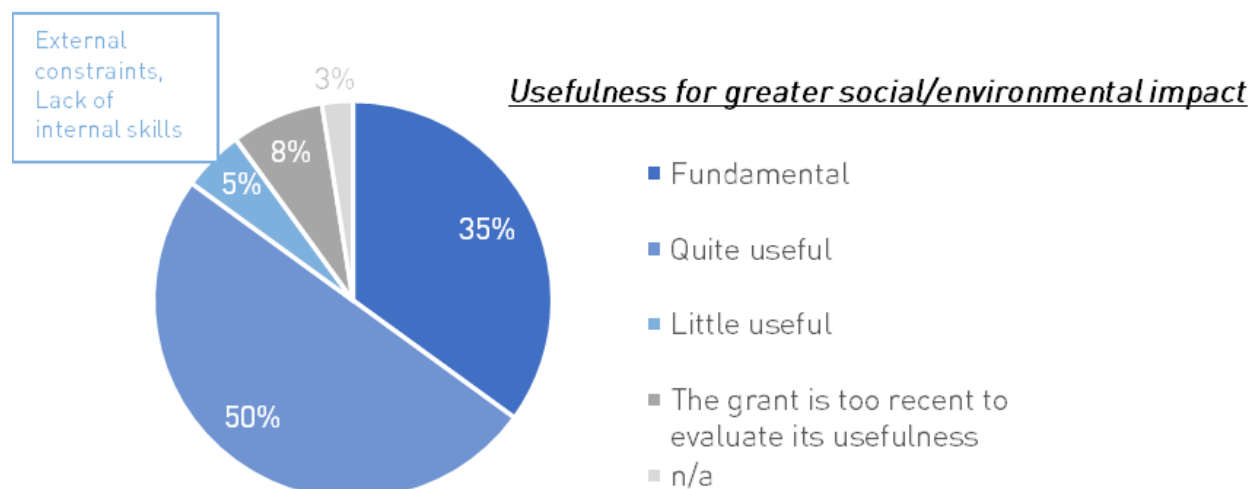
Use of the grant



Usefulness for business enhancement



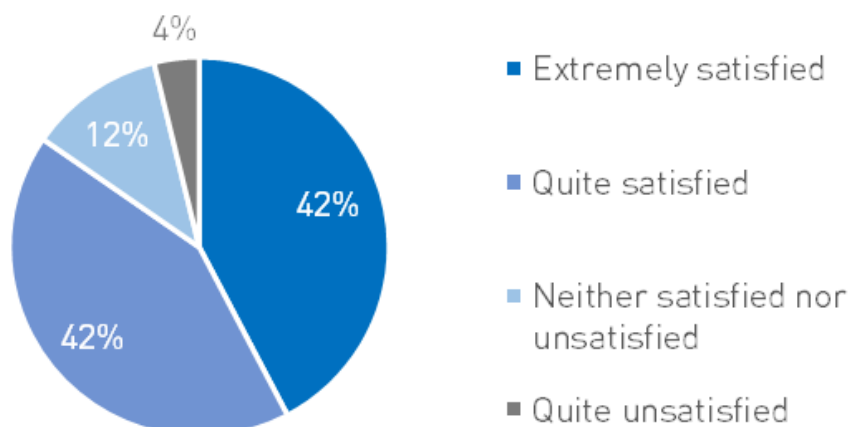
Usefulness for greater social/environmental impact



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

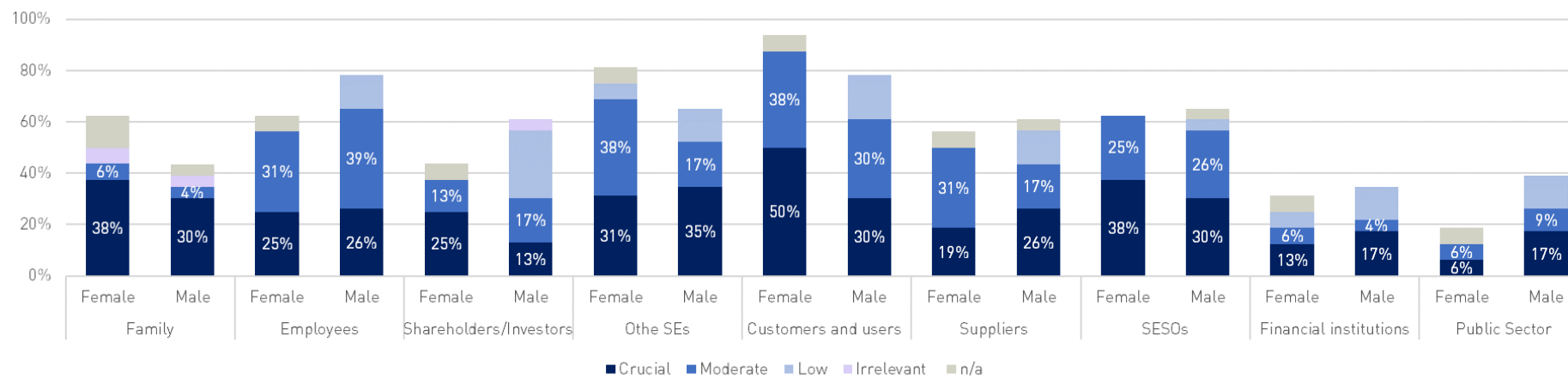
Figure 7. Final evaluation survey results concerning micro-level beneficiaries' satisfaction for the exchanges and networking events organized by the project

Percentage distribution of the survey respondents' answers, based on the reported Likert-scale (N=40)



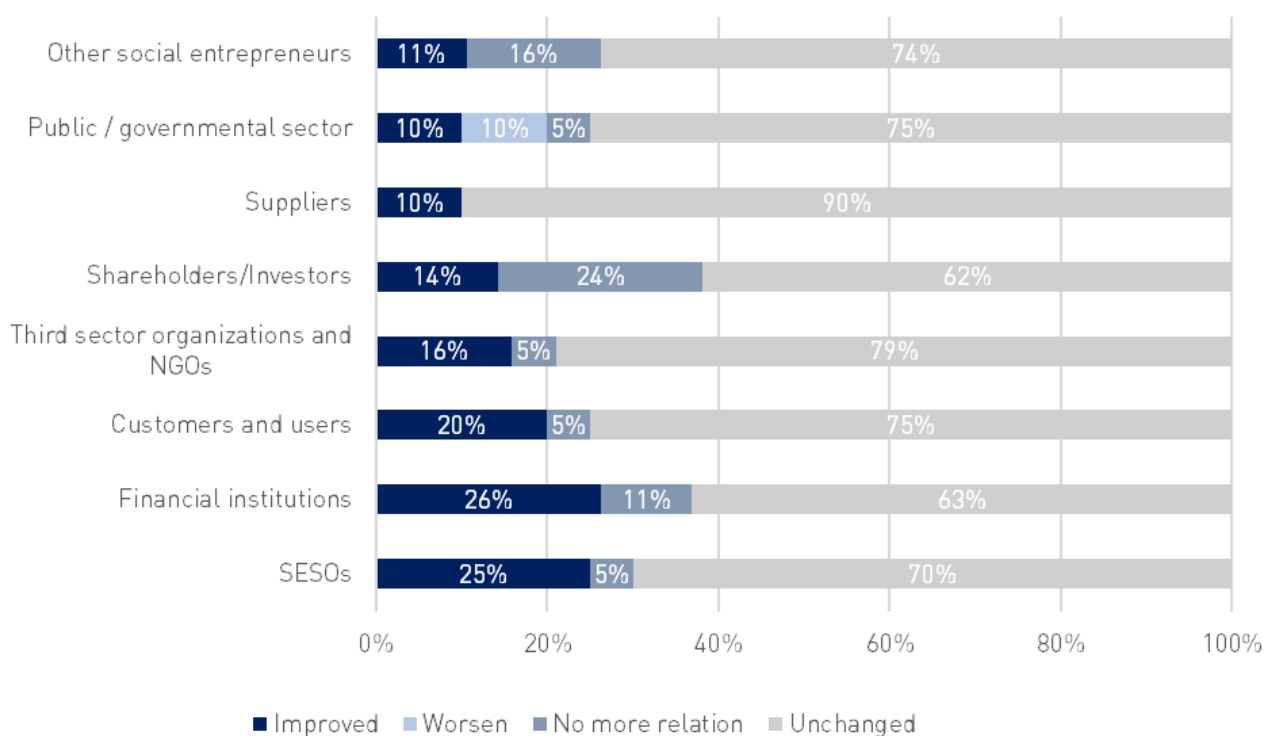
Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Figure 8. Final evaluation survey results concerning the perceived positive influence of the project in improving SEs' relationships with their key stakeholders
Percentage distribution of the survey respondents' answers, by gender (N=40)



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Figure 9. Final evaluation results concerning the evolution of SEs' relationships, compared to the MTE scenario
 Percentage distribution of the survey respondents' answers, compared to ones collected during the MTE (N=26)



Source: ARCO's elaboration on data extracted from the Mid-Term and Final Evaluation surveys for MedUp! Social Enterprises

MAIN DETECTED OUTCOMES FOR MEDUP! SOCIAL ENTERPRISES SUPPORT ORGANISATIONS

Intermediary Outcome n.2

Quality and accessibility of support services for SEs and coordination among social entrepreneurship support organizations are increased

“

One of the most important things I learned through this experience is building new connections and networks.

I managed to meet new people from the same domain but also coming from different countries which

”

added a lot to my experience

“

MedUp capacity building programme was very helpful because it strengthened the social enterprise understanding in addition to learning how to build support programs for social entrepreneurs. We used the toolkits provided by the trainers to build multiple

”

programs

Interviewed MedUp! beneficiary SESOs

Evaluation findings confirm a general satisfaction of MESO level activities, namely the Peer Exchanges and the Capacity Building program. As for the latter, it was remarked by the project staff an

improved and more tailored response to the targeted beneficiaries in the last two years of the project (→ **Relevance**), with particular reference to the successful Peer to Growth activity in Year 4. As for the Peer Exchanges, despite the negative effects of Covid-19 pandemic, findings confirm that they fruitfully addressed the need for networking and exchange by SESOs and provided them with valuable opportunities to expand their networks even internationally.

As emerged from the semi-structured interviews and the SFGD with SESOs from all partner countries, MedUP! project proved to be successful in supporting SESOs to achieve the main detected outcomes presented in Box 6 below.

BOX 6: MAIN DETECTED OUTCOMES FOR MEDUP! SOCIAL ENTERPRISE SUPPORT ORGANISATIONS

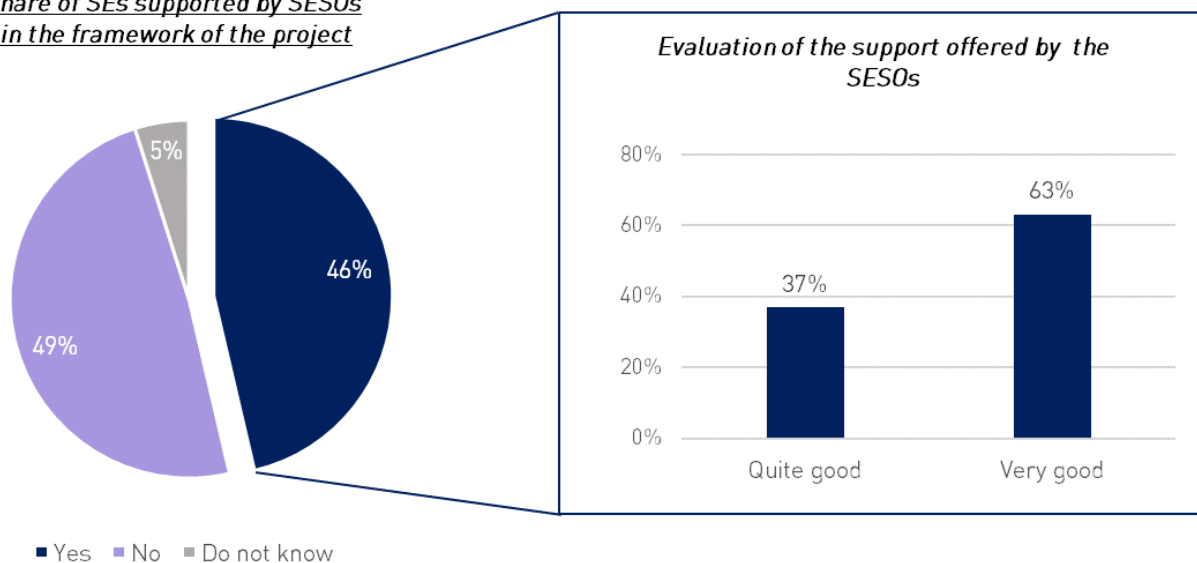
- **Increased skills and know-how** to offer quality support to SEs (i.e., support to business scalability, SEs growth (→ Figure 10))
- Establishment of **solid connections** with SEs and SESOs (→ Figure 8)
- Fostered **learning, dialogue and connections** between SENT actors within and across borders

Moreover, SE survey results showcase a satisfactory support offered by beneficiary SESOs to targeted SEs (→ Figure 10).

Figure 10. Final evaluation survey results concerning SEs' satisfaction for the services offered by the SESOs in the framework of MedUp! Project

Percentage distribution of the survey respondents' answers as for the reported evaluation items (N=40)

Share of SEs supported by SESOs in the framework of the project



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

MAIN DETECTED OUTCOMES FOR MEDUP! ENGAGED LOCAL STAKEHOLDERS

Intermediary Outcome n.1

Policy makers and key private and public stakeholders at local, national and regional levels are actively engaged in improving youth and gender sensitive policies and legal frameworks on SE

“

I learned a lot during this experience. Firstly, I managed to build new networks. Secondly, this project gave us a good overview of different experiences in other countries and thus expanded our knowledge in this regard. (...) Getting to know about these experiences such as the Spanish and Italian one will be very beneficial for developing and adding to our national experience.

I will be definitely using this added knowledge in my work in particular while working with a team to revise

the draft of the SEs law. (...) ”

Interviewed MedUp! policy-level actor

Interviewed local stakeholders, ranging from policy-level actors, academic researchers and formal institutions who were engaged at various extent in the project activities (such as Peer Reviews and roundtable discussions), all **confirmed the**

effectiveness and usefulness of their experience with the project. In particular, Box 7 below showcases the key outcomes that were detected through the semi-structured interviews to the project stakeholders in partner countries.

BOX 7: MAIN DETECTED OUTCOMES FOR MEDUP! ENGAGED LOCAL STAKEHOLDERS

- Greater **knowledge and awareness of SEs**, their objectives, their potential impact, their needs, and the challenges they face
- Increased interest, awareness, and knowledge on SENT thanks to the **learnings drawn from different SENT frameworks in other countries**, namely how SENT is defined abroad, how the SENT sector is regulated and governed and the role of governments in such sector
- **Awareness of the importance of having an enabling legal framework for SENT ecosystem** and how the government can actually support SEs' growth and the overall SENT ecosystem development
- **Increased awareness, networking, and connection with SENT ecosystem actors**, nationally and internationally

BOX 8: LESSONS LEARNT FOR FUTURE INTERVENTIONS

The following takeaways were highlighted by respondents (project staff and project beneficiaries) during the evaluation data collection activities:

MICRO LEVEL

- One-by-one technical support to SEs is as much important as financial support and the two being linked is fundamental for the overall support to be effective
- Some project implementors found that SESOs are better placed to offer technical support and coaching to SEs instead of external consultant companies
- Capacity building programs for SESOs may also benefit SEs
- The greatest challenges women-entrepreneurs face in the project countries are cultural barriers and stereotypes associated to gender roles
- SEs and SESOs' cross-country interaction and exchange are important to foster mutual learning and boost innovation and positive emulation behaviours

MESO LEVEL

- SESOs are well-placed for a gender-advocacy role or to support SEs to advocate for change
- Long-term commitment of SESOs to capacity building programs is challenging. Hence, condensing the trainings in a shorter timeframe at the project start, then focusing on the most engaged ones could be an effective strategy
- Longer Peer Exchanges could unfold more benefits for participants
- SEs and SESOs' cross-country interaction and exchange are important to foster mutual learning and boost innovation and positive emulation behaviours

MACRO LEVEL

- Working on the policy-level is challenging, it requires time, strong knowledge of the local culture and mainly consists of building and nurturing personal relationships with key actors
- Advocacy actions on SENT greatly benefit from social impact evidence and success stories of SEs and SENT actors

OVERALL:

- A multi-level approach proves to be effective when working holistically on SENT ecosystems where, in fact, different levels and actors are deeply interconnected with one another
- Addressing gender issues requires a great context-sensitive approach as country have their own cultural and social norms, stereotypes and power relations challenging gender-equality and empowerment

2.4 Efficiency

Despite the relevant external challenges, particularly the Covid-19 pandemic, the significant plurality of project partners, and the ambitious project design which all required much coordination efforts in terms of project management, **the overall project performance proved to be efficient.**

A COMPLEX RESOURCE MANAGEMENT

Overall, the **project proved its cost-effectiveness** as used financial and human resources allowed the **delivery of all planned activities** and the **achievements of the project target indicators** by the end of the project, despite the severe global pandemic challenging context (→ **Annex 5, Logical Framework**).

In addition, as per the latest approved No Cost Extension approved budget, 87% of overall resources (excluding overall administrative costs, EU human resources and operating costs) were allocated to MENA countries and project activities, which is in line with the project objectives.

However, three main challenges were remarked in regard to the human and financial resources:

- The considerable number of project implementors indeed added considerable **complexity** in the overall financial management of the project budget.
- **The budget amount limiting an appropriate staffing** for some EU technical partners, the gender team and PMUs in project countries. This was reported to have partially reduced the possibility to carry out more intensively or more impactful project activities, for instance, a more tailored and context-specific capacity building for SESOs across countries, a more intensive technical support to SEs, and more intense advocacy activities. This finding is consistent with the MTE assessment (→ **MTE**, page 65). On a positive note, the budget allocated for **gender-specific project activities** in project countries was reported as sufficient.
- Overall a **high project staff turnover** was reported as a great challenge to the project efficiency across almost all implementing teams (both EU and MENA partners), as this required much coordination efforts to maintain internal alignment on the project strategy and implementation.

⁸ “Transformative change is a change that starts with increasing individual awareness and leads to a collective change both in the formal (policies, regulations, laws) and informal (social norms and behaviours) setting. In a social enterprise context, it can mean more awareness of women in their abilities that lead to a collective action

DIVERSE AND COMPLEMENTARY PARTNERSHIP

As already stressed during the MTE (→ **MTE**, page 67) the overall Consortium showcased a **good level of diversity and complementarity in terms of expertise** which was conformed to the project needs. Indeed, the intense exchanges and **mutual learning** across the Consortium was pointed out as one of the key added values of the project. However, it was reported that a stronger knowledge of the different countries’ contexts as well as a more country-oriented approach would have better supported the planning, coordination and delivery of the overall macro-level activities as well as the first rounds of the capacity-building program for SESOs. In fact, as stressed by most local partners, both these activities would have required a more significant adaptation to the specific features of the local SENT ecosystems and priorities. As per some respondents, this could have been fostered through a more intense coordination and co-planning of the activities (→ **Section 2.4, Efficiency - “A multi-form collaboration within the Consortium”**). In addition, for some countries, it was remarked that more financial resources would have allowed to engage local SENT technical experts improving the PMU’s capacity to better support the SEs, or to carry out a more informed, intensive and dedicated advocacy activity with local stakeholders.

AN IMPROVED BUT STILL NOT FULLY EXPLOITED GENDER EXPERTISE

A certain progress from the MTE findings in terms of **project implementors’ increased gender-awareness and expertise** was remarked by the Regional Gender Team during the Final Evaluation, albeit with different degrees among project partners. In this regard, the survey result indicating that almost all female survey respondents appreciated the project flexibility towards their personal and professional needs and duties can be considered as a positive indicator of gender-sensitive implementation (→ **Section 2.1, Relevance**, Figure 2). Whether the project staff was endowed with the needed knowledge and awareness to concretely adopt a gender-transformative approach⁸ in the implementation of project activities was, instead, a more debated topic among the interviewees. In general, some mismatch as per the expectations regarding the role and responsibility of the Regional Gender Team throughout the project was detected during the Final Evaluation. In fact, some

that influences a social enterprise law and change the way the community perceives the role of women in an innovative enterprise”. Source: MEDUP Gender Transformative Approach presented by The Gender Justice Team at the MENA Regional Platform (22.07.2019)

interviewed project implementors were expecting a stronger guidance and steering role concerning how to actually ensure proper gender-awareness in planning and delivery of the project activities. Others believed to already have an appropriate level of gender expertise for the project implementation or they were satisfied with the support received by the gender team when consulted on specific matters. According to the Regional Gender Team, Oxfam consolidated expertise in the field of gender empowerment and advocacy was sub-optimally exploited in MedUp! due to the limited amount of time that they were expected to allocate as per project design and, probably, to the limited engagement of the Gender Team in the project governance body. The latter, perhaps, would have helped to better align partners' expectations by agreeing on roles, responsibilities and coordinated planning to ensure gender-awareness across all project activities (→ **Section 3, Recommendations**).

A MULTIFORM COLLABORATION WITHIN THE CONSORTIUM

Overall, a **satisfactory level of collaboration between all project partners** supported an efficient project implementation both at regional and at country level, albeit, naturally, with different degrees of satisfaction across countries and/or between project implementors. For several countries, for example, the **friendly cooperation** between the local Oxfam office and the local partner was particularly remarked as one of the greatest results of the project and it is most likely an indicator of a continuous collaboration in future projects. Some **room for improvement** was instead reported as for the cooperation between EU technical partners and the PMUs. According to some implementors,

greater synergies and mutual support in the organization of the activities led by the EU technical partners either in the project countries or involving local stakeholder would have ensured a better channelling of common efforts and greater benefits in terms of local stakeholders' engagement.

AN EFFECTIVE AND ATTENTIVE REGIONAL MANAGEMENT AND GUIDANCE

One aspect on which all interviewed project staff unanimously agreed upon is the **remarkable work done by the regional project coordinator** whose considerable and delicate mediating role and attentive country-oriented approach allowed an **efficient and inclusive project governance and management** of such a complex Consortium. In particular, the regional coordination opted for a decentralised governance delegating much responsibility to country PMUs with the aim of leveraging their close knowledge of the local context, fostering local ownership and ensuring future sustainability. Also it was reported that the **solid administrative and financial tools** that were put in place since the project start helped an **attentive and effective project monitoring**.

TIMELY ACHIEVEMENT OF PROJECT OBJECTIVES ALLOWING FOR LEARNING & CAPITALIZATION

The project timing allowed a **timely achievement of the project objectives** and it was generally considered more than sufficient for project implementors to focus on capitalising on lessons learnt, consolidating networks and having significant impact, particularly during the last year of implementation (→ **Section 2.5, Sustainability & Section 2.6, Impact**).

2.5 Sustainability

Overall and despite the severely challenging global and national contexts, **the project showcases good chances of having achieved sustainable outcomes** which are likely to continue even after the project end. All the social, economic, financial, institutional and environmental aspects of sustainability have been investigated during the Final Evaluation.

MICRO level

PROMISING FINANCIAL AND SOCIAL SUSTAINABILITY OF SUPPORTED SEs

At **MICRO** level, **SEs current operativity** and, for some, even **expansion beyond national borders**, as well as their **strong commitment to their social goals** are promising indicators of their **financial and social sustainability in the future**, despite the dire effects of the Covid-19 pandemic on their business activities⁹. While 25% of survey respondents are not yet generating profits, more than 40% believe that they will be able to cover all their running costs with their business revenue during the year and more than 30% are already do. Moreover, final evaluation findings compared to the MTE have detected a 35% increase in the number SEs that use business income as one of the major sources of funds for their enterprise. This indeed proves the potential sustainability of the investments carried out with the project grants (mainly capacity building and training, tools and equipment for business and/or marketing (→ **Section 2.3, Effectiveness**, Figure 6) which positively coupled with a significant technical support and follow-up provided by the project throughout the 4 years. Moreover, more than 60% of respondents stated that grants and donations make less than 50% of their total income¹⁰, a promising indicator albeit SEs' grant dependence has been generally confirmed by the evaluation findings (→ **Section 2.7, Access to Finance**, Figure 19). Despite grants are one-off opportunities and with narrowed financial sustainability per se, MedUp! subgranting experience was said to have supported SEs in **acquiring or consolidating financial, administrative and management skills** (i.e., subgrant management, procurement policies, expenditure procedures, accountability and reporting) which are believed to

⁹ During both the Mid-Term and the Final Evaluation SE respondents were asked to provide a 0-to-5 score to rank the key priorities of their SE in the near future. Probably related to the negative effects of the Covid-19 pandemic on the economic sustainability of the social enterprises, 42% of the respondents have attributed a higher score to the achievement of greater revenue, compared to the MT evaluation. This was at the expense of a lower prioritization of all the scale-up and innovation goals.

¹⁰ A more detailed overview disaggregated by business development stage is provided in **Section 2.7, Access to finance**.

have boosted their self-confidence and which will make them **better placed to apply for other future supporting programs**. Results from the evaluation survey for SEs indeed confirm that MedUp! positively influenced their ability to access financing opportunities, particularly grants from projects, donations or fundraising (→ **Section 2.6, Impact**, Figure 14). As the current situation stands, financing opportunities for SEs in project countries are more likely to continue to be other grants as, even despite the project matchmaking efforts with financial actors, access to finance other than grants (i.e., bank loans, private or impact investing) remains a common challenge for SEs, and for WSE in particular, in all partner countries (→ **Section 2.7, Access to finance**).

Another relevant and potentially sustainable outcome for SEs and the wider SENT ecosystem is the significant contribution of the project in **improving SEs' relationships with their stakeholders**, particularly **customers and users, SESOs and other SEs**, especially for WSE (→ **Section 2.3, Effectiveness**, Figure 8).

Confirming the project promising sustainability potential at MICRO level, a 22% increase was detected with reference to the number of survey respondents involved both in the MTE and Final Evaluation that firmly believe that the benefits received from MedUp! support will continue to be present even after the end of the project¹¹ (→ Figure 11). Furthermore, bringing evidence to the likeliness of SEs' social sustainability, the pursuance of their social/environmental mission has remained a constant priority for most SEs, both in the MTE and final evaluation survey findings¹².

Moreover, the **successful women-led SEs, rural SEs or SEs working in/with marginalised and vulnerable contexts/people** are believed to continue to play a **powerful and inspiring example** both at household¹³ and community level as well as at wider ecosystem and policy levels, not only in regard to proving both SENT relevance and multi-dimensional impact, but also in terms of **fostering social inclusiveness and gender-equality**.

Among the measures that the project put in place to ensure the sustainability of the supported SEs, the **most successful** were reported to be the following:

¹¹ The comparative analysis between the SE surveys results from the MTE and final evaluation was carried out only on 26 SEs who responded to both surveys.

¹² During both the Mid-Term and the Final Evaluation SE respondents were asked to provide a 0-to-5 score to rank the key priorities of their SE in the near future.

¹³ Interestingly, survey findings showcase a crucial project contribution in improving respondents' relationships with their family, especially for female respondents (→ **Section 2.3, Effectiveness**, Figure 8).

BOX 9: MAIN EFFECTIVE MEASURES FOR SEs' SUSTAINABILITY

- Overall **subgrant design & implementation** allowing effective support to SEs' sustainability, in particular:
 - the **subgrant selection criteria** requiring more established/mature SEs instead of early-stage businesses;
 - the **co-financing** required from SEs¹⁴;
 - the **support/sensitization** given to SEs to secure other funds;
 - the co-creation with SEs themselves of their Financial Plans; and
 - the **sustainable investments** made with MedUp! grants.
- **Tailored and closely monitored support** to SEs throughout the project lifetime
- **Matchmaking and fostered linkages** to connect supported SEs to other local support or business opportunities and key actors (i.e., financial institutions)

MESO level

PROMISING SUSTAINABLE OUTCOMES FOR SENT ECOSYSTEMS & KEY ACTORS' OWNERSHIP

MESO and **MACRO** levels also **showcase good potential for sustainable outcomes**. The project was said to have contributed to develop a narrative on SENT, **building awareness** and sensitising local ecosystem actors on the relevance of SENT and its importance for local wellbeing, social stability, sustainable economic and social development and resilience. The project was reported to have also fostered the **creation of a community of SENT actors**, in particular supporting the establishment of some good connections between SESOs as well as between SEs and SESOs (→ **Section 2.3, Effectiveness**, Figure 8) within and across countries, but also sparking the interest of some **financial actors** which were engaged in the project.

The most dedicated and involved **beneficiary SESOs**, with particular reference to SESOs in the Pair to Growth program, are indeed believed by project implementors to have acquired new awareness of the potential **leading and strategic role** that they could play in **driving their SENT ecosystem development in the future**. This was also confirmed by participant SESOs in the evaluation SFGD. Moreover, interviewed country implementors have generally expressed a good level of satisfaction in

terms of the **project capacity and effort to identify and engage key local SENT actors**, albeit with different degrees among project countries.

Among the measures that the project put in place to ensure the sustainability of the outcomes at MESO level, the **most successful** were reported to be the following:

BOX 10: MAIN EFFECTIVE MEASURES FOR ECOSYSTEM SUSTAINABILITY

- **Decentralized project governance** fostering local ownership
- **Financial mappings & networking events with financial institutions**
- **Many and effective synergies & exchanges** of best practices with other programs, projects and opportunities in the region
- **Networking opportunities** organized and sustained between SENT actors within and across MENA and EU countries through the Peer Cycle Events, Peer Exchanges, networking events, round tables, conferences and many other activities throughout the project lifetime
- Joint **portal** with Youth Participation and Employment (YPE) project to share knowledge and information about youth and entrepreneurship & economic empowerment issue in the region ("*Opportunities 4 Mena Youth*"¹⁵)
- **Successful Peer to Growth strategy** proving to be very relevant and helpful for participant SEs and SESOs and also effective in sparking the interest of local financial institutions.
- **Supportive toolkits and materials developed throughout the project** (i.e. Peer Exchange Manual, Scalability Toolkit, SEs' Good practice mapping - "Promoting social entrepreneurship in the Mediterranean region", the documentary on Women-led SEs, the **Gender Virtual Regional Learning Workshop** for project staff from which useful e-learning materials could be made available also to benefit project target groups and other local stakeholders, and many more)
- **SE-MENA regional platform**¹⁶ which will be left to local actors to be administered and promoted

¹⁴ The Lebanese case was remarked as the sole exception. Given the dire current conditions of the financial system, finding alternative sources of funding to comply with the co-financing requirement is now very challenging for SEs.

¹⁵ <https://o4my.org/ype/>

¹⁶ <https://se-mena.org/>

MACRO level

POTENTIAL SUSTAINABLE OUTCOMES AT MACRO LEVEL

The work done by the project at **MACRO** level with policy-level actors, despite being the most challenging level both for the ambitious pursued project objectives and the considerable external challenges of the local contexts, may unfold some **effects in the future**. Albeit with different extent across project countries and ultimately depending on future local governments' orientations and priorities, hopefully the project policy advocacy efforts will contribute to ignite some changes needed to make national legal frameworks enabling for the targeted SENT local ecosystems. Indeed, interviewed policy-level actors engaged in macro level activities found the latter helpful as they provided them with the opportunity to learn from different SENT frameworks in other countries, in particular how SENT is defined and how the SENT sector is regulated and governed and the important role of governments in such sector.

KEY CHALLENGES TO FUTURE SUSTAINABILITY

Despite the above, there are some **constraining factors** that respondents highlighted as potentially hindering the overall sustainability of the project outcomes:

BOX 11: POTENTIALLY CONSTRAINING FACTORS FOR SUSTAINABILITY

- Business sustainability could be a **greater challenge for SEs at less advanced business stage, especially in highly unstable political and economic contexts**
- Lacking availability and/or accessibility of **financial products** for SENT actors (→ **Section 2.7, Access to finance**)
- SEs are generally **grant-dependent** and not attractive to financial institutions and private investors (→ **Section 2.7, Access to finance**)
- (in most project countries) Absent tailored **legal frameworks** challenging SEs' sustainability
- **Social norms, cultural stereotypes** and **power relations** challenging gender empowerment are deeply rooted and embedded in MENA societies and hard to change
- (in some project countries) Severe **national economic, social and political unrest**
- (in most project countries) **Political instability** and changing governmental priorities and orientations toward SENT
- **Low integration** between MENA region countries and absence of a regional body committed to SENT and to a regional gender advocacy plan

PROMISING TECHNICAL SUSTAINABILITY

Turning to the project **technical sustainability**, respondents confirmed that MedUp! was indeed a learning and enriching experience for the project implementors who overall highlighted a **positive cross-learning and expertise contamination within the Consortium**. The project is believed to have offered an opportunity for EU partners as well as the donor to delve deep into project countries' contexts and SENT ecosystems, to map and engage their key SENT actors and players, to learn about their specific features, their similarities and their marked differences, their contextual challenges and degree of SENT development. In turn, MedUp! allowed for several country project implementors to **acquire or to strengthen their technical skills and expertise on Social Entrepreneurship**, to adopt an ecosystem approach and to learn more on how to adequately support Social Enterprises (including WSE and SEs in remote contexts), both through the project experience itself or by personally attending project activities (i.e., the capacity building programs for SESOs or the Pair to Growth scalability program). Moreover, country project partners have all highlighted the **positive and strong relationships established with beneficiary SEs** and their **commitment to continue to foster such connections and their future support** by, for example, helping them to take advantage of future opportunities offered by other support programs. This indeed is an added value also for local implementors as they could leverage these rooted relationships for more effective future outreach and local impact. Additionally, many implementors voiced how putting in practice the overall **MedUp! subgranting methodology and process** was a consolidated learning experience which they could definitively replicate in the future. This may likely hold true for the other methodologies followed or piloted by the project, such as the **Peer Review Cycle Methodology**, the **Peer Exchanges formats** and the **Pair to Growth experience** which could also be replicated by local implementors and/or inspire future similar strategies. Moreover, to some extent, a certain **progress in terms of increased gender-awareness and expertise** has also been detected across some implementors - albeit with different degrees across project countries and project implementors - which can also potentially benefit future interventions.

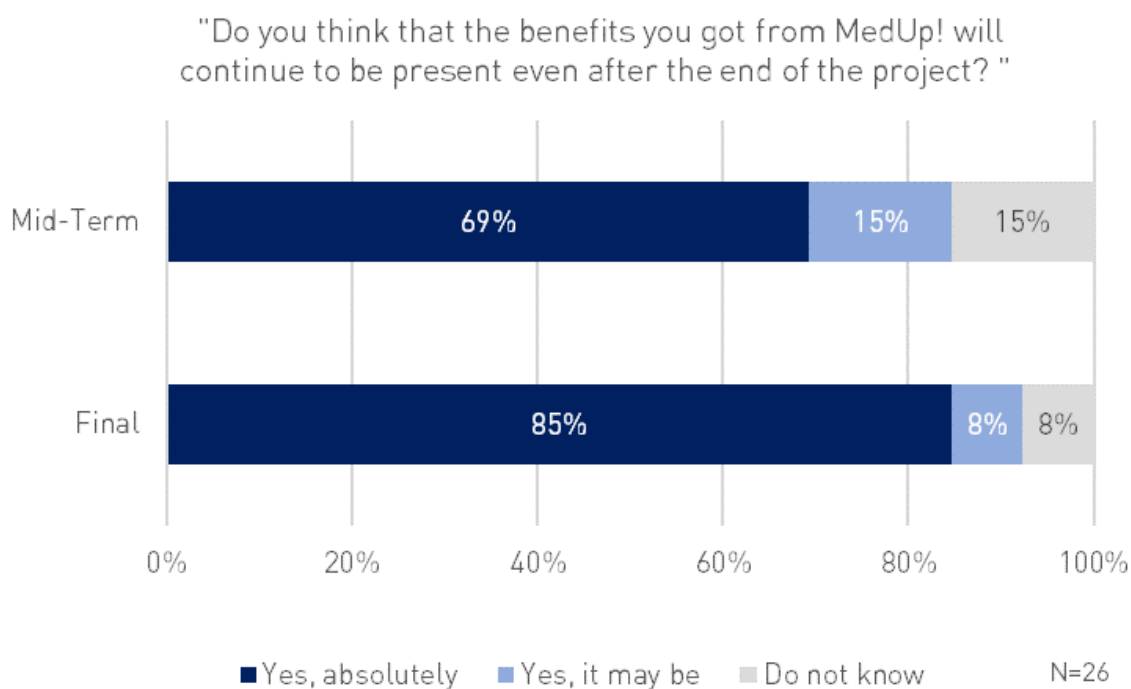
MORE UPCOMING SUPPORT FOR SENT IN THE MENA REGION

Finally, while obviously the project will not be financially sustainable per se as all projects operate within the boundaries of set budgets which are entirely used during their lifetimes, the donor has voiced its commitment to fund **another upcoming program in the area continuing to pursue MedUp! overall objective**. Moreover, it was

confirmed that MedUp! key learnings and experience will greatly feed the current design of this new program. This, indeed, points out to a **motivated commitment to keep sustaining and improving**

the EU efforts in promoting SENT as a key strategy to achieve an inclusive, equitable and sustainable development in the target area.

Figure 11. SEs' opinion regarding the sustainability of the benefits received from MedUp! Project
Percentage distribution of the survey respondents' answers collected during the Mid-Term and Final evaluation (N=26)



Source: ARCO's elaboration on data extracted from the Mid-Term and Final Evaluation survey for MedUp! Social Enterprises

2.6 Impact

As underlined by the OECD/DAC Network, the impact criterion “*addresses the ultimate significance and potentially transformative effects of the intervention [...] to capture the indirect, secondary and potential consequences of the intervention.*” (OECD-DAC, 2019, p. 11). Albeit real impact on beneficiaries and SENT ecosystems will be assessable only in the long run, data collected and analysed by the evaluators unfolds informative elements that point out a **future impact potential of the results achieved by the project.**

POTENTIAL SOCIAL AND ENVIRONMENTAL IMPACT OF MEDUP! SES

As the majority of MedUp! SEs are successfully operative and are more than likely to continue their business even after the project end (→ **Section 2.5, Sustainability**), the potential **social and environmental impact** they may have on their local communities appears to be also very likely. Indeed survey results showcase a **positive project contribution in the achievement of SEs’ social and environmental goals** (→ Figure 12). This implies **potential long-term and transformative changes for the SEs’ stakeholders**, as employees, suppliers, customers and other SEs’ beneficiaries. This potential impact is even more relevant considering the skill-enhancement as well as the new jobs opportunities created by the SEs for their employees belonging to vulnerable categories, young people and women (→ Figure 12).

POTENTIAL GENDER IMPACT

The SE survey results highlight a **remarkable potential gender impact** as respondents claimed that MedUp! positively contributed to **enhancing women’s business skills** and creating **new job opportunities for them** (→ Figure 12).

Additionally, as remarked in this Section, survey results disaggregated by gender highlight that MedUp! positively contributed to increasing supported women’s ability to access **some forms of financing**, mainly grants, donations or fundraising, a significant result given the challenges women face in accessing finance in the MENA region. In this respect, it is remarkable that the support offered by MedUp! appears to have generated greater positive effects for women social entrepreneurs than for their male counterparts (→ Figure 14).

Moreover, survey results showcase a potential step forward in **improving gender power relations and dynamics** as respondents stated that MedUp! significantly contributed to giving voice to female social entrepreneurs, favouring their active participation to day-to day activities and fostering

female decision-making power (→ Figures 12 and 13). Indeed, results from female respondents to the evaluation survey showcase a meaningful support from the project in improving their relationships with stakeholders, particularly with their customers and users, SESOs, other SEs and, remarkably, with their families (→ **Section 2.3, Effectiveness**, Figure 8). This finding is particularly relevant considering a potential gender impact of the project, as it may be considered promising evidence of the **potential and beneficial micro-transformative changes** which MedUp! was able to trigger for the supported women entrepreneurs. Additionally, it was remarked by the evaluation respondents that successfully supported WSE have a noteworthy potential to be **inspiring role models** within their households, for other aspiring women entrepreneurs and their community at large in the future. Furthermore, a potential gender impact on the wider target areas is likely to be enforced also by the project efforts that were dedicated to **gender advocacy and disseminating activities** (i.e., documentary on WSE challenges, national gender advocacy plans, social media campaigns, media and press coverage, dissemination of WSE best practices), albeit harder to accurately measure at present.

Finally, properly assessing an increase of gender-sensitive implementing capacities of the entire project staff was beyond the scope of this evaluation. Nevertheless, a certain progress in terms of increased gender-awareness and expertise has been detected across some implementors - albeit with different degrees across project countries and project implementors (→ **Efficiency & Effectiveness**) - which can also be considered a potential project impact unfolding effects in the long-run and in future interventions.

A STEP FORWARD IN IMPROVING ACCESS TO FINANCE FOR SEs

Evaluation findings confirm that the project attempt to improve the access to finance for SENT actors was positive, albeit there is still room for more dedicated and focused future intervention in this sector (→ **Section 2.7, Access to finance**).

Survey results point out to the fact that **MedUp! has increased SEs’ ability to access their preferred forms of financing**, namely **grants from projects**, donations or fundraising, particularly for WSE. Instead, other forms of financing- such as loans from banks, private investments or micro-credit - are harder to access for SEs, especially for WSE, and generally less preferred compared to other financing mechanisms which have less strict requirements and less binding repayment conditions (→ Figure 14, below, and Figure 21 -**Section 2.7, Access to finance**). Consistently with this finding, the project influence in improving SEs’ relationships with financial institutions was somewhat

limited, albeit better results were detected compared to the MTE scenario. It should be noticed, however, that some improvements in the SEs' relationships with shareholders and investors were also detected (→ **Section 2.3, Effectiveness** Figure 8). Nevertheless, interviewed project staff remarked how specific MedUp! activities - such as the Pair to Growth program or targeted networking events - did lead to promising connections between SENT actors and engaged financial institutions. Moreover, the comparative analysis between survey results of the MTE¹⁷ and the final evaluation highlight a 40% increase in the number of SE respondents mentioning "Financial institutions" as key players for their development (→ **Section 2.3, Effectiveness**) and a 26% and 14% increase in the number of SEs declaring to have improved the quality of their relationships with, respectively, financial institutions and shareholders/investors (→ **Section 2.3, Effectiveness**, Figure 9). Additionally, compared to the Mid-Term scenario two more SEs declare to use bank loans as a primary source of financing, while 3 more SEs have stable access to grants. Evaluation findings indeed point out a potential project impact in terms of improving SEs ability and willingness to access forms of financing for their business sustainability. A more detailed analysis concerning beneficiary SEs' access to finance is provided in **Section 2.7 - Access to finance**.

BREAKING SILOS BETWEEN SENT ECOSYSTEM ACTORS AND LEVELS

The innovativeness of the **holistic, systemic and multi-level MedUp! approach** to the overall SENT ecosystems was remarked as something new and unique in partner countries. This in most cases brought relevant evidence of the inherent

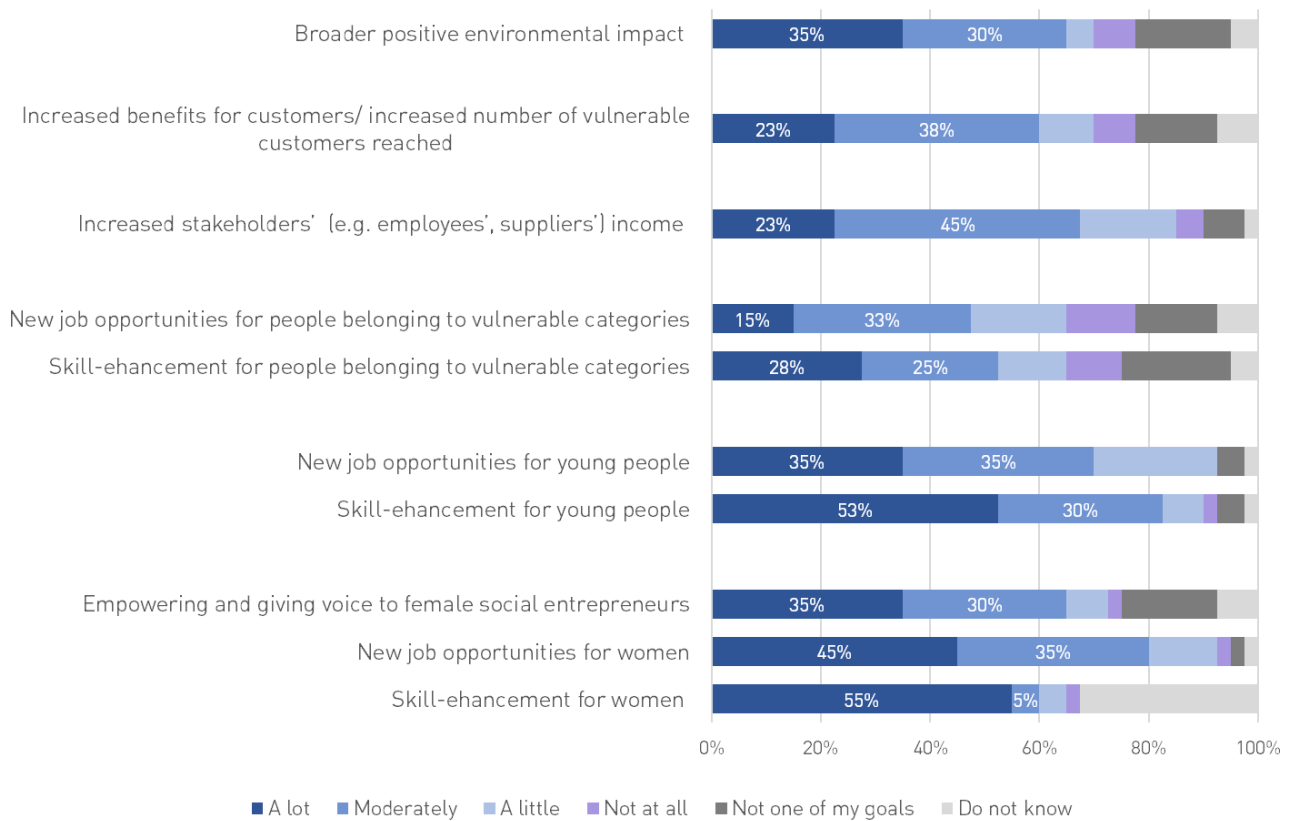
interconnections among different levels and actors orbiting the SENT ecosystem and for the need to continue to work with such comprehensive approach in the SENT ecosystems in all partner countries. Considering the beneficiary SEs' point of view, the survey results indeed confirm the positive influence of MedUp! in improving SEs' relationships with other ecosystem stakeholders, particularly other SEs and SESOs and, to a minor extent, with shareholders and investors, financial institutions and public sector entities (→ **Section 2.3, Effectiveness** Figure 8). Additionally, a comparative analysis between MTE and final evaluation survey findings indicate an increase in SEs' relationships with their stakeholders in the last two years of the project implementation, with particular reference to SESOs and financial institutions (→ **Section 2.3, Effectiveness**, Figure 9). Findings from the evaluation interviews also confirm that the project beneficiary local stakeholders had the opportunity to connect and exchange with many national and international SENT players which is believed to have overall contributed to **strengthening the SENT ecosystems** in partner countries.

A POTENTIAL STEP FORWARD POLICY CHANGE

Albeit with different extent across project countries and ultimately depending on future local governments' orientations and priorities, hopefully the project policy advocacy efforts will contribute to ignite some changes needed to make national legal frameworks enabling for SENT local ecosystems. Indeed, the detected outcomes for MedUp! engaged local stakeholders (→ **Section 2.3, Effectiveness**, Box 7), especially for policy-level actors, may unfold effects in the long-run, should the countries' interest and commitment in SENT continue and further advocacy efforts be sustained.

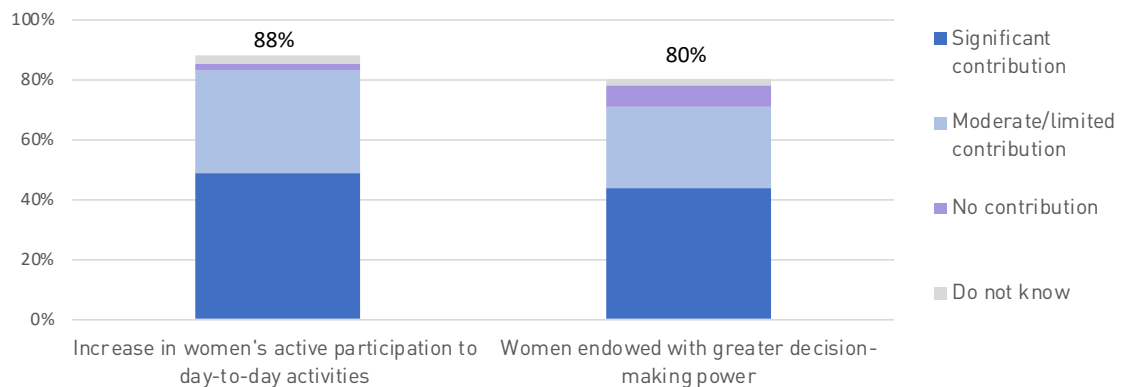
¹⁷ The comparative analysis between the SE surveys results from the MTE and final evaluation was carried out only on 26 SEs who responded to both surveys.

Figure 12. Final Evaluation survey results concerning the perceived project contribution to the achievement of SEs' goals
Percentage distribution of the survey respondents' answers as for the reported evaluation items and Likert scale(N=40)



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

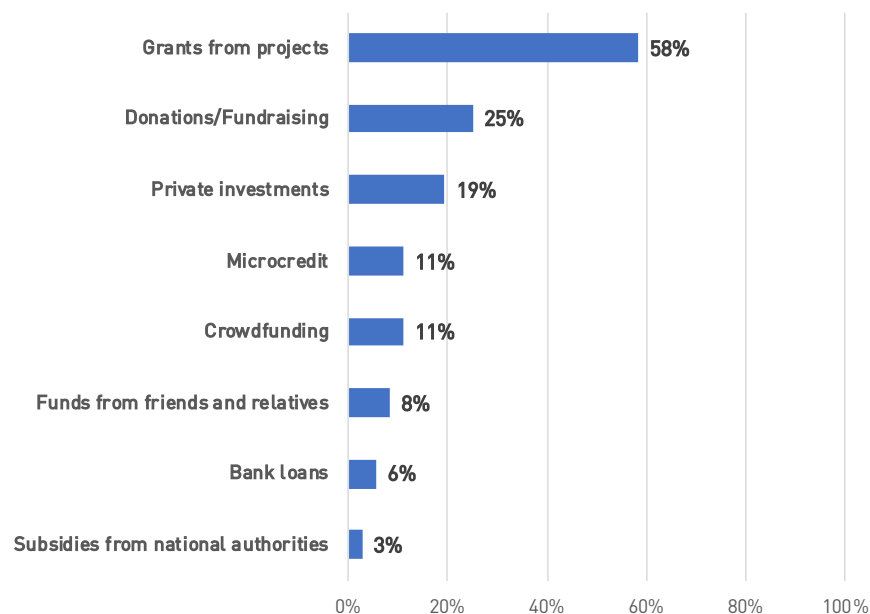
Figure 13. Final Evaluation survey results concerning the perceived project contribution to the achievement of gender outcomes
Percentage distribution of the survey respondents' answers as for the reported evaluation items and Likert scale(N=40)



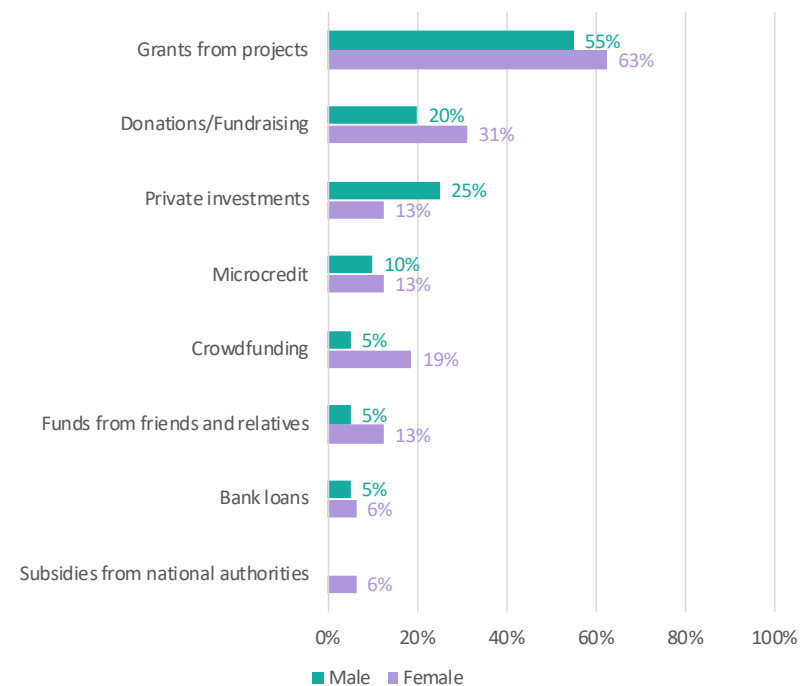
Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Figure 14. Final Evaluation survey results concerning the perceived project influence in facilitating SEs' access to finance, overall and by gender
 Share of respondents selecting the reported evaluation items, overall and by gender (N=36)

Share of SEs acknowledging a positive influence of MedUp! in increasing their ability to access different financing mechanisms



Gender disaggregated effects



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

2.7 Access to finance: beneficiaries' point of view

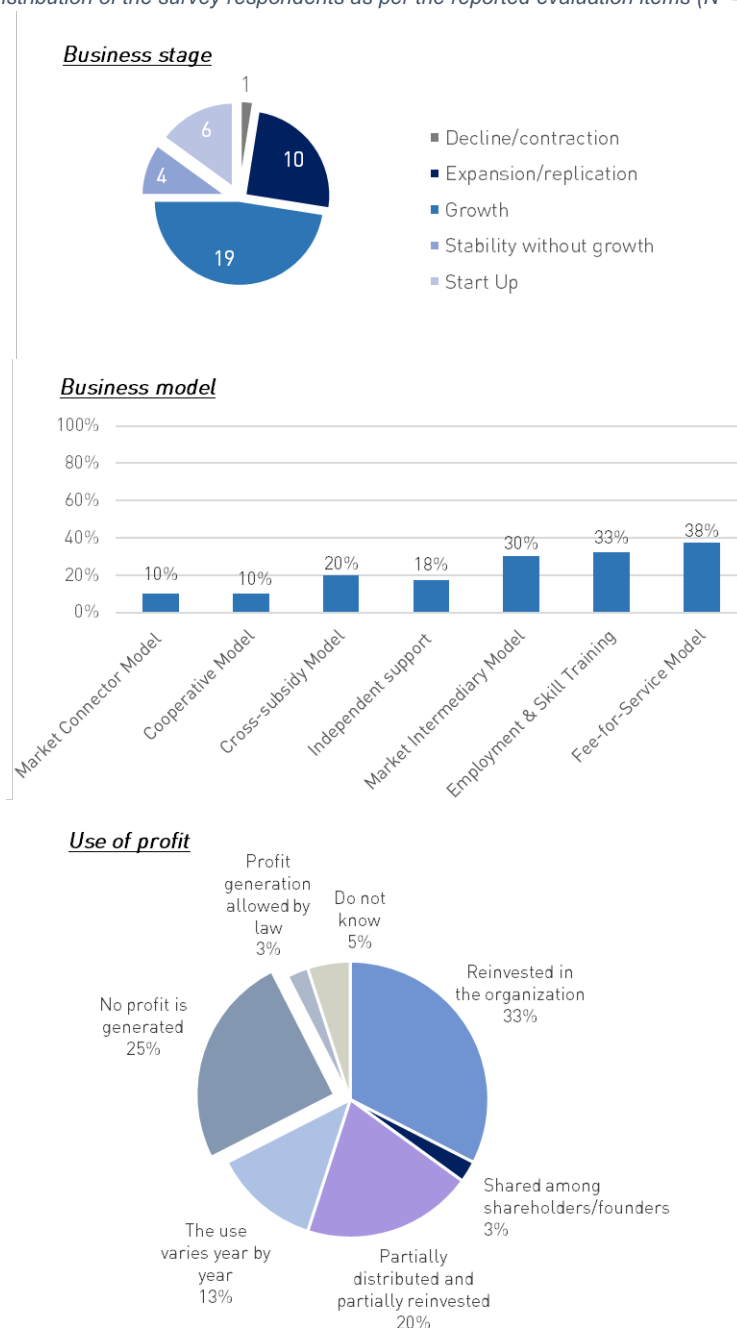
This Section is aimed at delving into the topic of access to finance, based on the key insights that emerged from the data collection activities implemented during the final evaluation, in particular the survey administered to the SE beneficiaries of MedUp! project.

Figure 15 provides an overview of the micro-level beneficiaries' characteristics in terms of the development stage, business model, and profit use. As can be noticed, out of the 40 surveyed SEs, almost half declared to be in the "Growth" phase,

while one-fourth said to be in the process of scaling up ("Expansion/replication"). As for the business model, "Fee-for-service", "Employment & Skill training" Market Intermediary" are the most frequently applied models by the surveyed SEs. Despite performing entrepreneurial activity on a continuous basis, 25% of SEs still do not generate profit by the end of the year and another 3% are not even legally allowed to do so. Among the SEs generating profit, the majority reinvest it, either completely or partially, in the organization.

Figure 15. Overview on SE respondents' business profile: business stage, business model and use of profit

Distribution of the survey respondents as per the reported evaluation items (N=40)

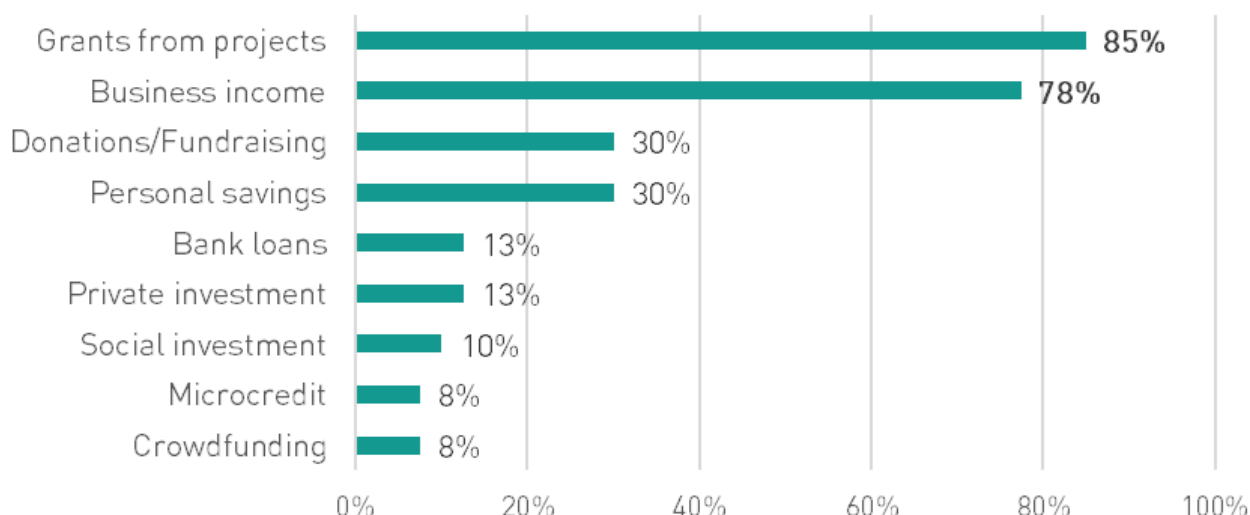


Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Concerning economic sustainability, it should be noticed that 85% of the surveyed SEs declared to use “Grants from projects” as one of the main sources of financing. Noteworthy, this percentage

is higher than the share of SEs which acknowledged “Business Income” as a primary source of funds (78%) (Figure 16).

Figure 16. Final evaluation survey results concerning the main sources of financing used by the SEs
Share of the survey respondents selecting the reported response items (N=40)



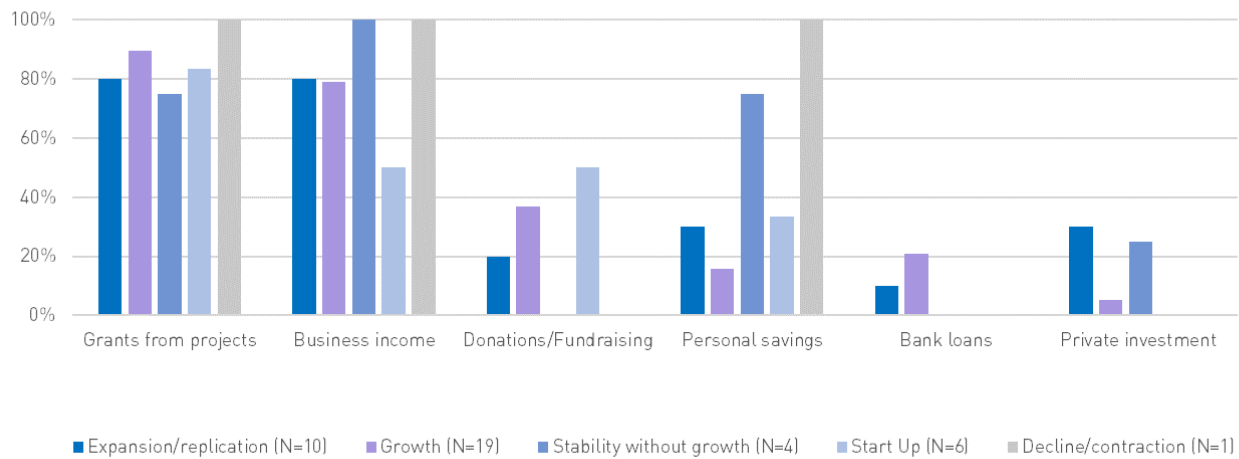
Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

However, the key source of financing used by the SEs appeared to vary according to the different business stages (Figure 17). Apart from the grants which were found to be a relevant source across all the business stages, from a comparative viewpoint, start-ups tend to showcase higher reliance on “Donations/Fundraising” and less reliance on business income. By looking at Figures 17 and 18 it can be noticed that the more advanced the business stage, the lower the reliance and relative weight of all the *pro bono* sources of financing and the higher the use of more sophisticated sources of

credit, both in the forms of equity and debt. Consistently with this finding, the majority of beneficiary SEs in the start-up phase are still not able to cover their running costs through their business income (more than 80% - Figure 18) and grants and donations cover more than 50% of their total income (Figure 19). Nevertheless, supported start-ups believe to be able to achieve economic sustainability either in the near future (50%) or in the long run (17%) (Figure 18). Conversely, supported SEs at more advanced business stage showcase a greater economic sustainability.

Figure 17. Final evaluation survey results concerning the main sources of financing used by the SEs, by business stage

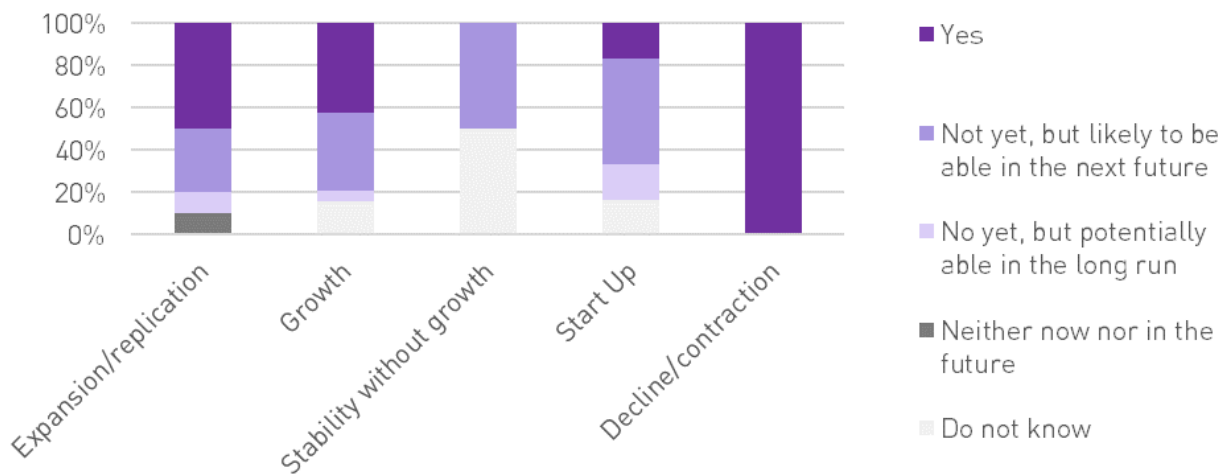
Share of the survey respondents selecting the reported response items for each of the selected business stages (N=40)



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Figure 18. Final evaluation survey results concerning SEs' ability to cover all running costs with their business income

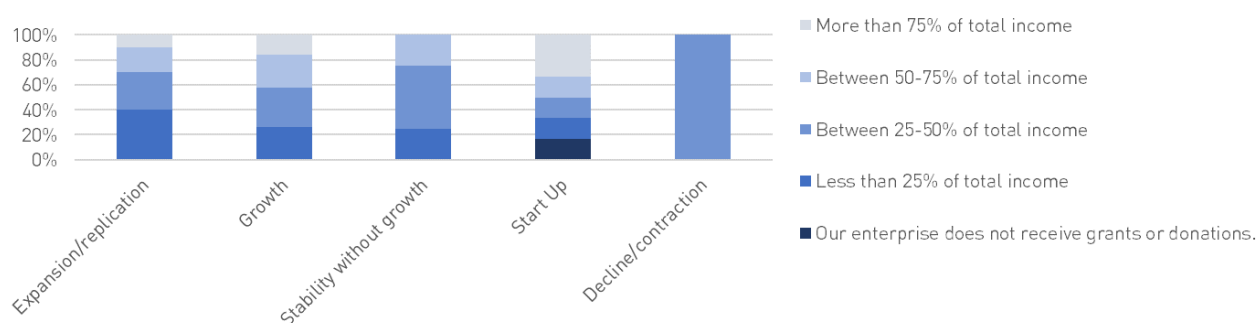
Percentage distribution of the survey respondents' answers according to the SE business stage (N=40)



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Figure 19. Final evaluation survey results concerning the average percentage of SEs' income provided by grants and donations

Percentage distribution of the survey respondents' answers according to the SE business stage (N=40)



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

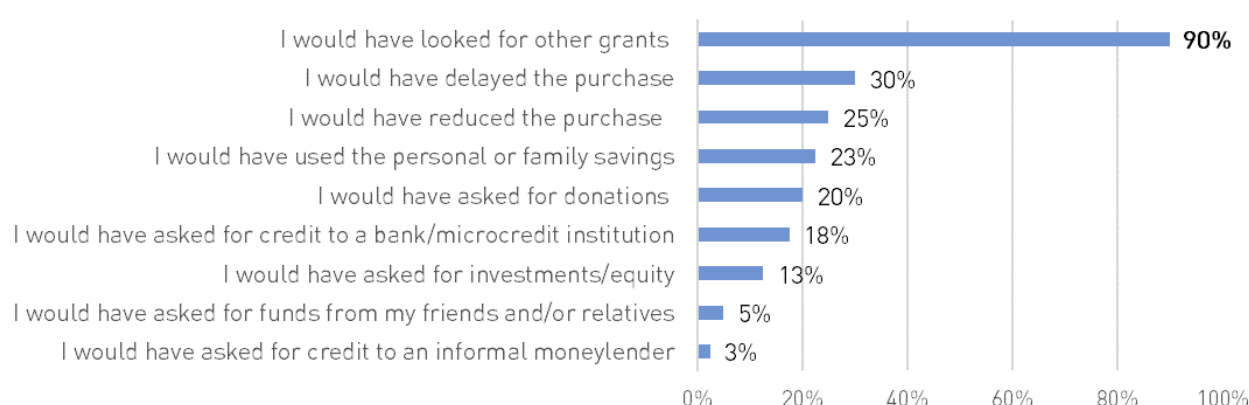
As confirmed also during the Focus Group Discussion with SEs and SESOs, **grants are the main source of financing** that SEs usually have access to in the MENA region. Indeed, there is a significant presence of several donors promoting this financing mechanism in the area and, understandably, grants are more appealing to SEs as they are a *pro bono* form of financing. The significant reliance on grants was also strikingly confirmed by the fact that 90% of the SEs declared that they would have looked for another grant in the absence of funds provided by MedUp! (Figure 20).

Despite this preference, however, accessing grants is not free of hurdles for SEs. As stressed by the interviewed beneficiaries, applying for a grant usually requires specific skills, access to proper information and networks and, in most cases, fluent use of the English language, all assets that SEs, particularly those in their earlier stages and/or located in remote areas, may lack. Likewise, it was stressed that access to grants may become more challenging also for mature enterprises if they fail to fit donors' agendas.

Figure 20. Final evaluation survey assessment on SEs' alternative actions in the absence of MedUp! grant

Share of the survey respondents selecting the reported response items (N=40)

"What would you have done if you had not received the grant from MedUp! project?"



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Nevertheless, challenges in accessing grants are still perceived less onerous compared to approaching financial institutions, whose credit comes with higher requirements, interest costs and repayment obligation. Figure 21 confirms this

finding as bank loans rank lowest in SEs' preferred financing mechanisms.

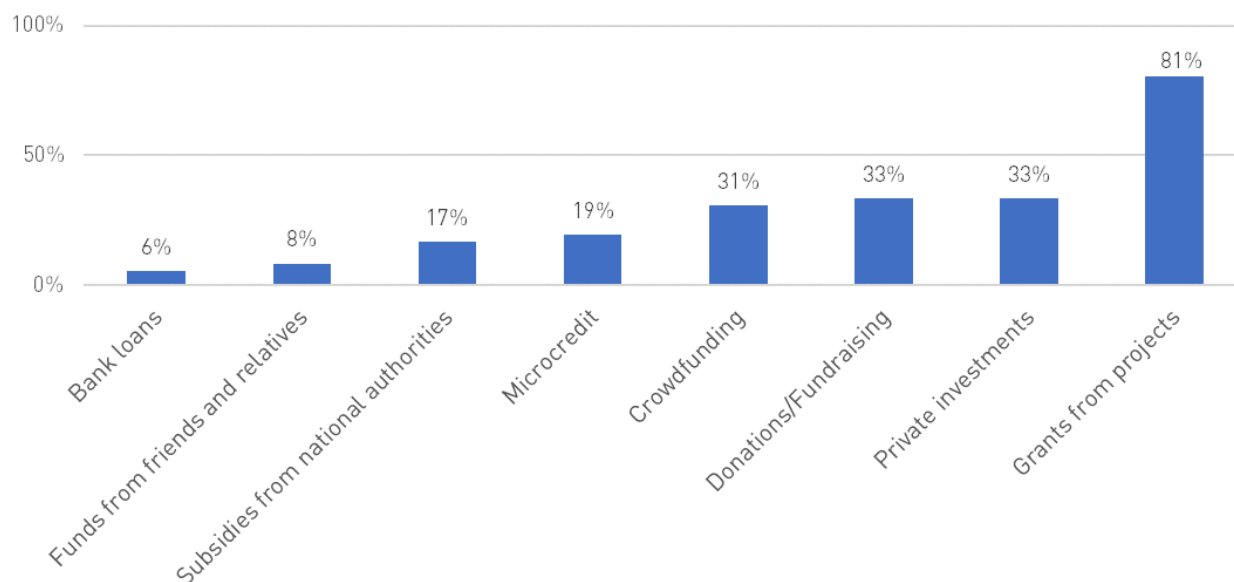
It may be interesting to notice that, besides grants, SEs wish to have better access to financing mechanisms primarily dealing with private entities (Private investments,

Donations/Fundraising/Crowdfunding), while funds issued by governmental authorities are generally

considered appealing only for a residual share of SEs.

Figure 21. Final evaluation survey assessment on the financial mechanisms to which SEs would like to have better access

Share of the survey respondents selecting the reported response items (N=40)



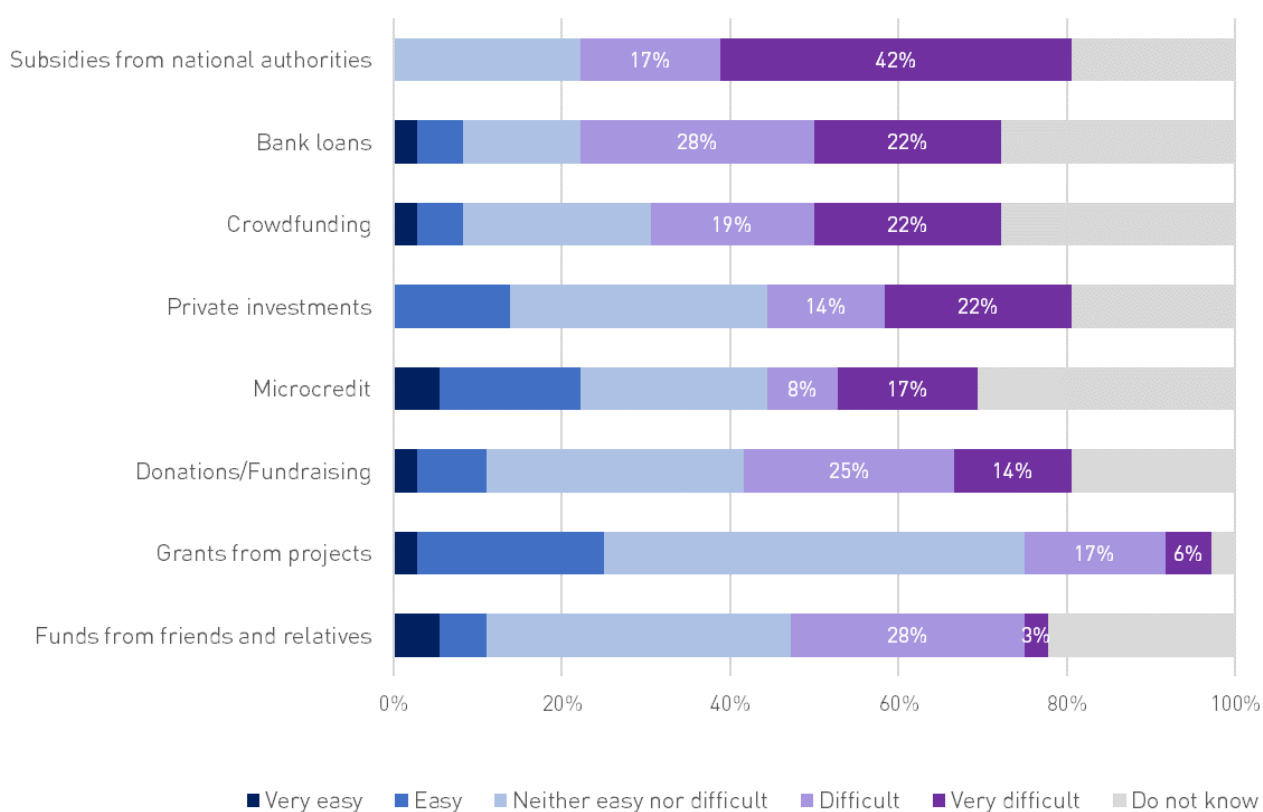
Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Figure 22 confirms that SEs' preferences are indeed associated with a general greater difficulty for them to access bank loans and governmental subsidies. The key constraints mentioned by

respondents to the evaluation survey and the SFGD with SEs and SESOs in terms of access to finance are reported in Tables 2 and 3.

Figure 22. Final evaluation survey assessment on SEs' perceived easiness to access the different financing mechanisms

Percentage distribution of the survey respondents' answers as for the reported evaluation items and Likert scale (N=36)



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Table 2. Main detected challenges for SEs in accessing finance in the MENA region

ACCESS TO FINANCE: CHALLENGES FOR SEs (1/2)	
	<ul style="list-style-type: none"> • Absence of a suitable legal framework for SEs • Low availability of funding opportunities (other than grants) in MENA region • Social entrepreneurs' scepticism about accessing formal credit because grants and donations are perceived as more advantageous • SEs' business financial instability at early stages • Absence of profits for certain SEs • Low credibility of SEs: lack of awareness, information, and positive evidence on SENT and SEs' potential impact • Difficult access to information and financial opportunities for SEs • Limitations deriving from religious reasons • Limited accessibility to financial opportunities in rural areas
	<p>* Detected additional challenges faced by women entrepreneurs:</p> <ul style="list-style-type: none"> • Negative influence of social norms and customs • Discrimination due to traditional gender roles • Underestimation of women's capacities • Lack of women entrepreneurs holding leading position

Table 3. Main detected challenges for SEs in accessing finance in the MENA region, per type of financing source

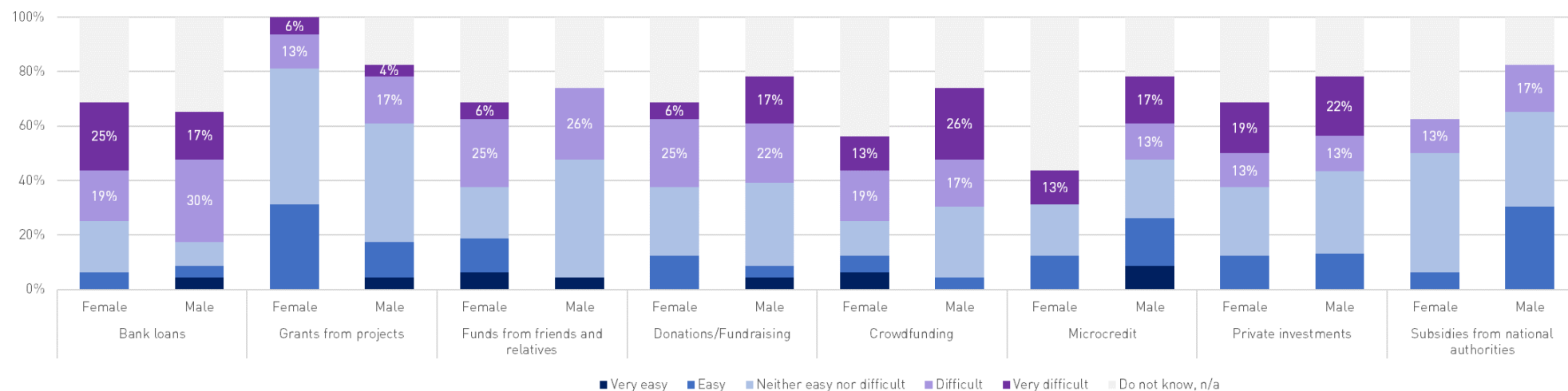
ACCESS TO FINANCE: CHALLENGES FOR SEs (2/2)	
BANK LOANS	<ul style="list-style-type: none"> • Strict eligibility requirements in terms of enterprise maturity, legal form, requested collaterals, creditworthiness etc. • Lack of support services from banks while applying for credit • Complex procedures to ask for formal credit and difficulties in providing the needed documentation • SEs' concern that getting credit would hinder their social impact • High interest rates • Limited capacities to look for and deal with formal credit mechanisms
PRIVATE INVESTORS	<ul style="list-style-type: none"> • Lack of proper communication channels to engage investors • Limited capacity to engage potential investors • Investors' low interest in SE • Investors' aversion to investing in risky activities (e.g. agriculture) • SE not being familiar with investors' mindsets • Investors' preference for businesses of the digital economy over traditional sectors
FUNDRAISING	<ul style="list-style-type: none"> • Budget constraints limit the capacity to hire specialized staff for fundraising • Lack of copywriting skills

GRANTS	<ul style="list-style-type: none"> • Budget constraints limit the capacity to hire specialized staff for project design • Lack of proper communication channels to engage donors • Limited capacity to engage potential donors • Limited SEs' compatibility with Donors' requirements concerning legal norms & regulations • Short notice for fund proposal deadlines • Limited capacity to apply for and manage more grants at the same time • Funds conditional to donors' interest and agenda • Lack of support initiatives to promote SE economic self-reliance • Funding preference for early-stage SEs • Language barrier (English) • Lack of skills to write proposals • Co-funding requirement • Unclear timing for fund issuance • High competition among applicant SEs in urban areas
CROWDFUNDING	<ul style="list-style-type: none"> • Illegal in some countries (i.e., Egypt) • Lack of know-how and experience in dealing with crowdfunding
IMPACT INVESTORS	<ul style="list-style-type: none"> • Lack of impact investors • Requirement for high net profit • Requirement for sophisticated documentation, intense follow-up and due diligence

Gender differences in accessing funds were also investigated during the evaluation. In this regard, Figure 23 allows us to compare the accessibility of the different financing mechanisms across gender. While for women entrepreneurs accessing grants was found to be comparatively easier, they tend to face greater constraints in accessing formal credit (such as bank loans). This was confirmed both by

female survey respondents and during the Focus Group Discussion with SEs and SESOs (Table 1). Remarkably, perceptions of gender-related difficulties and discrimination were differently acknowledged by the survey respondents, according to their gender. As depicted in Figure 24 a greater share of women respondents acknowledged greater constraints for women than their male counterparts.

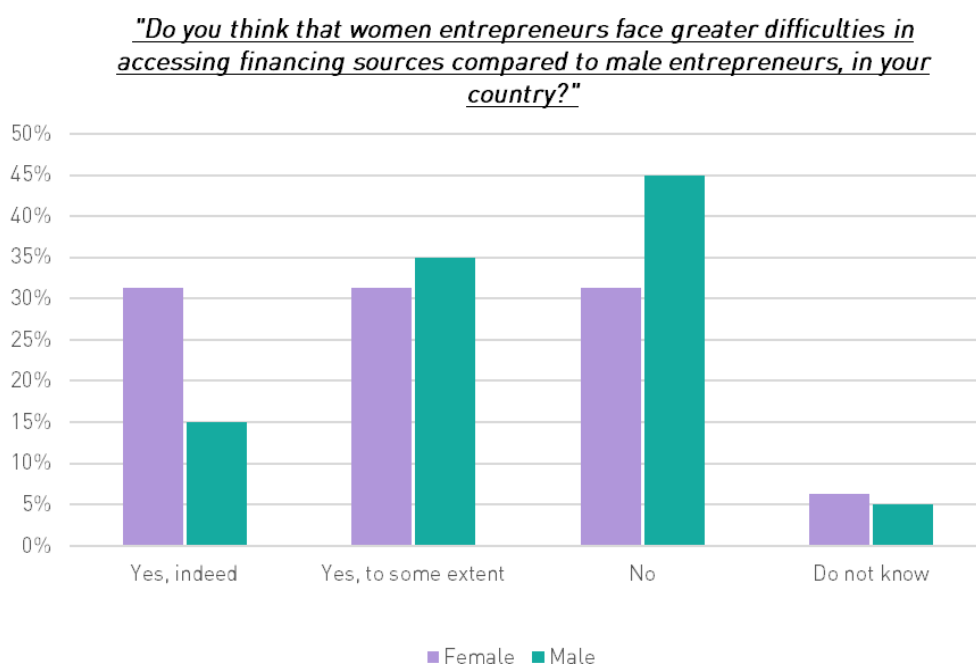
Figure 23. A cross-gender comparison on SEs' perceived easiness to access the different financing mechanisms
 Percentage distribution of the survey respondents' answers as for the reported evaluation items and Likert scale, by gender (N=36)



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Figure 24. Final evaluation survey results concerning respondents' perception of gender gaps in SEs' access to finance

Percentage distribution of the survey respondents' answers to the reported question, by gender (N=36)



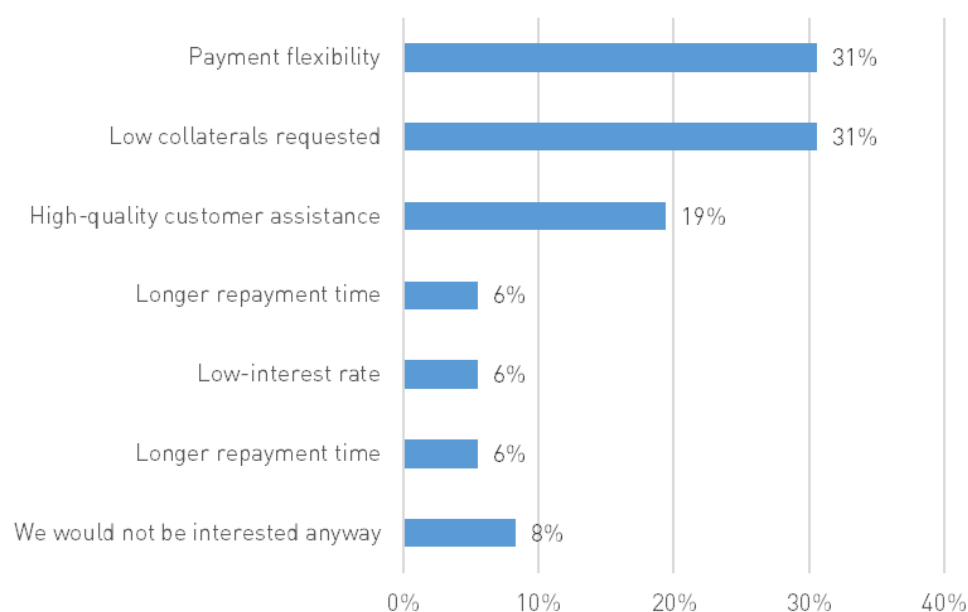
Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Finally, when asked about the key features that a financial product should be endowed with to be easily accessible and advantageous for SEs, almost one-third of survey respondents refer to payment flexibility and low collateral requirements, followed by a higher quality customer assistance (Figure 25). Against this backdrop, the evaluation found a positive influence of MedUp! project in increasing the social entrepreneurs' ability to **access their preferred forms of financing**, namely

grants from projects, donations or fundraising, especially for WSE (→ **Section 2.6, Impact**). In addition to proving the project effectiveness against its pursued objectives, as well as the relevance of the intervention given the contextual challenges highlighted here, this finding is considered by the evaluators a potential long-term change for beneficiary SEs and the wider targeted SENT ecosystems.

Figure 25. Final evaluation survey assessment on the key features that a financial product should have to be affordable and convenient for the SEs

Share of the survey respondents selecting the reported response items (N=36)



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

3. Recommendations for future interventions

Drawing from the preliminary findings of MedUP! Final Evaluation, the Evaluators identified key topics to bring to the Consortium's attention to stimulate a collective reflection during the Final Coordination Meeting which took place in Florence on June 27th-29th, 2022. The ultimate aim of such collective learning and capitalization process was to feed key recommendations for future intervention.

To facilitate the collective discussion, the evaluators elaborated key guiding questions and hinted possible strategies and examples based on the findings of MedUP! Final Evaluation.

The following final recommendations, therefore, integrate key elements that were detected by the Evaluators during the fruitful discussions and exchanges between the Consortium members during the event.



Fostering commitment and engaging synergies between SENT ecosystem key players

EMPOWERING SESOs & INCENTIVISING MARKET CONNECTIONS BETWEEN SEs & SESOs

"Empowering SESOs is not only about building their capacities but it is also a matter of giving them the opportunity to be financially sustainable"

Final Evaluation interviewed respondent

The evaluation findings confirmed **SESOs' need for financial support, tailored capacity building** as well as backing for **more market connection with SEs**.

The **positive outcomes of the Pair to Growth Program** confirm the effectiveness of the paired support to SESOs and SEs and it is therefore suggested for future interventions to continue to work in such direction.

In this respect, project grants could also be made available for applicant **SESOs** to finance supporting tools (i.e., platforms) and/or services/programs for SEs, such as supporting programs to access markets, including foreign markets (i.e. e-commerce, digital marketing), or support services to access funding opportunities, to name a few.

Together with the financial support, selected SESOs should receive **tailored and specialized capacity-building and technical assistance** to develop their support programs.

Furthermore, in order to **support market connection between beneficiary SESOs and SEs**, the latter could receive the awarded financial support in the form of, for example, **vouchers** to purchase SESO's supporting programs.

Additionally, an **incentive system** to foster successful support programs as well as beneficiaries' responsibility and ownership could be put in place. As a simple example, the project voucher for the support program could initially cover 60% of its total value, while SEs contribute with another 10%. SEs and SESOs should formally agree on the support plan and on co-established and attainable objectives/target results. If, and only, the latter are achieved at the end of the support program, the project could cover another 20% of the voucher value, while the SE the remaining 10%. Conversely, should the set objectives fail to be achieved, more resources could be made available for additional vouchers. Another incentive mechanism could be put in place through specific **labels/certifications for SESOs** to increase their market recognition.

All incentive systems should ensure a **proper project monitoring** of the support program and a **sound final evaluation of the outcomes**.

ENHANCING SESOs' MARKET-SPECIALIZATION	<p>The evaluation findings also pointed out the need to enhance SESOs' specialisation in specific market sectors and subsectors. Hence, future programmes should foster and support SESOs' specialization, both in terms of targeting and investing in specialized SESOs as well as in focusing on tailored, market-specific capacity-building and exchange programs.</p>
FOSTERING SYNERGIES WITH THE PUBLIC SECTOR: TESTING PUBLIC-PRIVATE PARTNERSHIPS TO PROMOTE SOCIAL INNOVATIONS	<p>Engaging local institutional actors could unlock fruitful synergies with the public sector and potentially foster co-production strategies to improve the local welfare systems.</p> <p>Future interventions could carry out thorough mappings to identify local public institutions (i.e., municipalities) to be actively engaged in order to determine key needs and problems faced by the community (i.e., waste management). The subsequent call for subgrants could target suitable SEs which can adequately address such needs.</p> <p>The identified local public institution should be part of the Evaluation Committee in the subgrant selection and evaluation process.</p> <p>Awarded SEs could then sign PPPs (Public Private Partnerships) with the local institution and collaborate for the co-planning and delivery of the welfare service.</p> <p>Additionally, a target indicator of such kind of intervention could be the number of PPPs signed by the local public institution with local SENT actors in the target area at the end of the project.</p>
IDENTIFYING STRATEGIC ADVOCACY APPROACHES TO ADVANCE SOCIAL ENTREPRENEURSHIP LEGAL FRAMEWORKS	<p>The evaluation findings shed light on the challenge of identifying and retaining committed policy level actors in advocacy activities.</p> <p>Indeed, the need to support macro-level change advancing the Social Entrepreneurship legal framework was confirmed as highly important for all 6 MedUp! countries. Formalising a legal form for SEs is key, among others, for SEs' market competitiveness, SEs' recognition boosting the overall SENT ecosystems, establishing governing bodies for SENT actors, favouring access to finance for SEs through, for example, tax incentives for investors supporting SEs.</p> <p>Possible advocacy strategies for future interventions could place strong focus on the identification of strategic actors to target. It was remarked that engaging prominent policy actors may expose project staff to the risk of tangling with one or the other political parties. Hence, an alternative strategy could be targeting and closely engaging with long-term staff members in key governmental institutions having the capacity to influence, in turn, the policymakers on duty.</p> <p>Another sustainable strategy for future interventions targeting the macro level is training key actors from the civil society (i.e., activists, youth organisations, civil movements) on SENT and advocacy tools and campaigning strategies so that they can continue the work even beyond the project lifetime.</p>



Materialising a proper gender transformative approach in future interventions

GENDER-EMPOWERING DESIGN	<p>For interventions aiming at a substantial gender transformative impact, the project design should be well informed by a thorough and preliminary gender analysis to make sure wrong assumptions do not undermine the project Theory of Change and, hence, the effectiveness of the intervention. This entails being aware and considering the</p>
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	<p>structural and societal challenges and barriers which women face and which may prevent them from accessing the opportunity offered by the project or/and from truly benefitting from the support.</p> <p>The project strategy should, hence, follow such preliminary analysis, identify the issues to be tackled and design activities accordingly.</p> <p>Additionally, future interventions adopting a gender-empowering design should thoroughly consider their targets, going also beyond women-led enterprises and prioritizing more broadly gender impactful business.</p> <p>Moreover, support for “non-conventional” issues for WSE should be considered, such as planning for childcare for participants in trainings, facilitate participation for women in rural areas, provide special support to SEs directly dealing with gender issues (i.e., gender-based violence), and work for minimal standards to be put in place in SEs (i.e., sexual harassment, recognition of parental leave).</p> <p>Additionally, when planning support to WSE, it is advisable to go beyond business aspects and also plan for soft skills training focusing, for example, on women’s visibility, skills, and self-esteem.</p> <p>Last but not least, future interventions adopting a gender-empowering design should also foresee a project component exclusively dedicated to gender training and capacity building for all targeted actors.</p>
GENDER BUDGETING	<p>A gender-empowering design should be also coherently reflected in the project budget. Dedicating an extra “gender budget line” ensures that the project activities can actually be shaped, tailored and flexible to gender-specific needs, even as they arise, unforeseen, during the project implementation. This would allow greater accessibility of such activities by covering, for example, childcare for women participating in trainings, expenses for relatives/partners/friends accompanying women to project events and activities, transportation costs to the venues.</p>
GENDER SUPERVISOR	<p>While indeed, guaranteeing a gender-sensitive project implementation should be the responsibility of all project staff in a Consortium, having a gender mainstreaming specialized team ensuring an adequate and systematic project gender-monitoring and guidance could be beneficial. Such team or figure should be fully assigned (100%) to the project, engaged at all levels and activities of the intervention as well as in the project governance bodies (i.e., Steering Committee).</p>
GENDER REPORTING & AUDITING	<p>It is advisable to include good gender KPIs in the project design and require a more gender-specific project reporting.</p> <p>Examples of gender KPIs could be the following:</p> <ul style="list-style-type: none"> • n° of successful women in “non-traditional” careers • Ability for women to access finance independently (without relying on men) • Ability for women to be represented in decision making process (at various levels: family, enterprise, community) <p>Moreover, a gender auditing (or even, more broadly, a “social inclusivity” auditing) for all supported SEs could be also considered.</p>
GENDER AWARENESS & CAPACITY-BUILDING FOR PROJECT STAFF	<p>A thorough and intensive gender training and capacity-building should be planned at the beginning of the project for all project implementors to ensure they have greater awareness, knowledge and appropriate tools to suitably identify and tackle gender issues in all the project activities they will be carrying out. Moreover, multiple follow ups on implementors’ mutual gender learning and exchange could be regularly planned throughout the intervention.</p>

STRATEGIC GENDER ADVOCACY

Gender advocacy remains fundamental in future intervention. In this respect, it is advisable to continue to work on **disseminating women entrepreneurs' success stories and challenges**. In this respect, planning for **WSE peer exchanges** within and across countries and provide them with large visibility could be an effective strategy.

Moreover, the strategic role of SESOs as per gender advocacy should be considered for future interventions. Interviewed MedUp! Gender Advisor stressed that the MESO level is best placed for an advocacy role and to help SEs and WSE advocate for change. Hence, more training and engagement of SESO on gender-equality and empowerment could unlock positive outcomes.



Measuring and fostering social impact to make sure we are making a difference

INTEGRATING A SOCIAL IMPACT ASSESSMENT FRAMEWORK WITHIN THE PROJECT DESIGN

Including a Social Impact Assessment in interventions supporting SEs with technical and financial contributions (i.e., sub-grants), is strongly suggested in order to identify the actual effects of the project, the change/s it generated, the added social value it produced.

Assessing Social Impact helps supported SEs to **assess, monitor and improve** their **performance**, allowing them to set **realistic objectives** and to **prioritise decisions**. Additionally, social impact assessment can **increase SEs' awareness** on the potential role they play in their local community as well as their capacity to **communicate such impact** to their relevant stakeholders and potential investors, making them more attractive for interested investors, supporting organisations or programs. Moreover, measuring the social value generated by supported SEs also informs the **project internal learning**, revision and capitalization processes which can improve the design of future intervention. Hence, measuring impact should go beyond compliance with donors' requirements in favour of a real learning process.

Interventions planning to integrate a social impact assessment of supported SEs require extensive technical expertise and should not underestimate needed time, resources, specific competences, and considerate planning beforehand, starting from the very drafting of the project proposal. In fact, a quality social impact assessment is a demanding process which requires **rigorous methodology, expertise and training**. Moreover, it is strongly advisable to rely on **an independent third-party organisation** specialised on social impact measurement in order to ensure that a rigorous methodological approach and process is planned and followed throughout the project implementation.

Additionally, it is important to foresee a dedicated and thorough **training and capacity building** both for SEs and SESOs on Impact Measurement and Management, as well as providing them with useful measurement toolkits and tools.

Finally, for **interventions piloting impact investing schemes** with a partner financial organisation, building a **proper social impact assessment framework** becomes fundamental. In this case, the framework should rely on a **common set of solid result indicators**, which can then be **tailored to the specific supported SEs**, and against which **financial support** is provided.



Delivering effective and sustainable financial support to SENT actors: piloting new financial support systems for SEs

PILOTING “HYBRID” AND “IMPACT” GRANTS

Future interventions could provide the opportunity to **rethink subgrant systems to decrease SENT grant-dependence** incentivizing their **access to other financing mechanisms**, as well as the **achievement of their entrepreneurial and social goals**.

This is the case, for example, of “**hybrid**” **subgrant mechanism** which are conditional, to various degrees, to the SEs’ access to other financial instruments, for example, a combination of grants, loans, convertible loans and equity, depending on what the organisation needs. Other examples are “**impact**” **grants** which are conditional to the achievement of the SEs’ entrepreneurial and social goals (i.e., number of people in disadvantaged/vulnerable conditions hired, tons of waste recycled).

Such mechanisms need to be thoroughly **assessed and studied with the local partner financial intermediary**, i.e., financial institution or semi-governmental organization, then **accurately piloted** through targeted interventions and, ultimately, **appropriately tailored** to the enterprises’ needs, capacities and **readiness** to embark in engaging with financial instruments.

PILOTING IMPACT INVESTING SYSTEMS

Future interventions may provide the opportunity to **design and pilot impact investing schemes** involving a “pentagram” partnership between an engaged **financial intermediary**, a **local public institution**, a **third-party social impact assessment evaluator**, a **third sector service provider** (i.e., social enterprise) and a **support organisation** (i.e., SESO) ensuring technical support to the SE.

Such systems need to be built upon a **proper social impact assessment framework** relying on a common set of solid result indicators, which can then be tailored to the specific supported SEs, and against which financial support is provided. Against this backdrop, it is advisable to avoid setting a plethora of metrics on social impact while converging, instead, on **focused metrics** on the specific impact pursued by each SEs.

TESTING INTERNATIONAL PARTNERSHIPS BETWEEN FINANCIAL INSTITUTIONS

Future interventions should consider the possibility of **supporting and fostering international learning exchanges and even partnerships between financial organisations across countries**, potentially unlocking fruitful support opportunities for the local SENT ecosystems.

An interesting example could be the case of the **Trait d’Union Project** in the framework of which the Italian Ethical Finance Foundation has set up a fund for the sterilization of EUR – TND exchange rate risks with a local financial institution for the provision of microcredit in favour of small Tunisian businesses whose activities are consistent with the circular economy approach.

MATCHING INTERNATIONAL FINANCIAL PLAYERS WITH LOCAL KEY SENT INTERMEDIARY ACTORS

Future interventions should thoroughly map, identify and actively engage **international financial players** (i.e., international investors) seeking for promising and impactful targets to fund. These players could potentially offer **fruitful opportunities to support local SENT ecosystems**, especially in countries facing financial instability. The role of future interventions to engage such international players could be strategic in that there is a need to wisely match them with **solid country intermediaries** to properly channel funding, for example promising and reliable **SESOs**.



Scaling up support to SENT ecosystems

WIDENING THE APPROACH TO SOCIAL IMPACT VALUE CHAINS

To scale the support of local SENT ecosystems, future interventions could **broaden their approach** from targeting and supporting single SEs to backing the **wider local value chains**. Following a **social impact value chain approach**, future projects could support the upgrading of identified and promising supply chains encompassing different organizations/businesses and support them to achieve targeted economic and social goals.

Such intervention could even **pilot an impact investing scheme**, linking a financial instrument, a sort of “**district bond**”, funding the overall consortium to implement a strategy of economic growth and social impact. For the mechanism to be in place, such social impact needs to be rigorously measured by a **third-party expert on social impact value chain assessment**.

Annex 1_ Methodology and research limitations

MedUp! Evaluation pillars

The Final Evaluation aimed at providing comprehensive and detailed insights and learnings about MedUp! project, according to the key evaluation pillars already identified during the Mid-Term Evaluation.

Consistently with the overall scope of the Evaluation, the methodology, which is extensively described hereinafter, was elaborated to effectively inform about the overall accountability of the Project and to provide all the relevant Project stakeholders with key insights and learning to further improve the quality and effectiveness of future interventions.

Evaluation pillars

- ✓ Synergies across the entire MedUp! Consortium
- ✓ Key engagement of MedUp! Teams & Partners
- ✓ Data harmonization across countries
- ✓ Cross-validation of findings
- ✓ Micro, Meso, Macro and Regional level analysis
- ✓ Cross-sectional Themes
- ✓ Participatory and self-enforcing Learning Process
- ✓ Listening to Beneficiaries' voices
- ✓ Quick adaptability to actors and circumstances
- ✓ Mutual learning and capitalization

Source: MedUp! Mid-Term Evaluation Report

Overall, the Evaluation process was designed by the ARCO team as a dynamic and participatory learning process, actively involving the most important stakeholders, including project staff, partners, and beneficiaries.

More specifically, the methodology was designed coherently with the 10 Objectives (A-J) and the Evaluation questions reported in the ToR (→ **Annex 2**). In particular, the Evaluation objectives outlined in the ToR were clustered into 3 main streams of analysis, namely:

Stream 1. OECD-DAC Criteria Analysis:

- Assess the relevance, coherence, effectiveness, efficiency, sustainability, impact and scalability¹⁸ of the project related to contribution to partnerships, accountability, value for money from the perspectives of different stakeholders, capacity to generate mid-term impact and development processes that continue after the project duration. This can include the appropriateness and relevance of the beneficiary selection. (Objective B of the ToR)
- Identify, assess and document the evidence for the achievement of expected and unexpected results of the project towards the intended outcomes following the two level of intervention (Meso and Micro). (Objective A of the ToR)
- Assess whether the management and governance structure of the project was fully functional to reach the project's objectives. (Objective F of the ToR)
- Assess the existing strategies for sustaining the project's results and recommend measures for new similar projects. This can be linked with the governance structure, decision making process, project implementation modality, etc. (Objective G of the ToR)
- Advise about possible and applicable measures and decisions that could have increased the project's capacity to develop activities at Macro, Meso and Micro levels that are sustainable and well anchored to national and regional social entrepreneurship ecosystems. (Objective I of the ToR)

¹⁸ The Scalability assessment criteria was taken into account by the Evaluators to inform the elaboration of Recommendations for future interventions.

- With particular reference to the sub-granting component of the project (1 million Euro as grants to local social enterprises), assess the effectiveness of this financial support and elaborate key recommendations. In particular, it will be important to assess whether the project made a “smart” use of the sub-granting component and tented to go beyond the classic approach by pushing towards the exploration of innovative financing mechanisms other than pure grants. Assess whether the sub-grantees have improved or perceived to have improved their confidence in managing, in the future, more complex financial products. (Objective C of the ToR).

Focus: Subgranting & Access to Finance Component in MedUp!

The Subgranting & Access to Finance Component was thoroughly assessed throughout the Evaluation. In particular, this aspect was analysed by applying a multiple-lens approach, encompassing **four complementary analytical perspectives**, namely:

1. The common Evaluation perspective, based on the assessment of the Subgranting component through the lens of the six OECD-DAC criteria of Relevance, Coherence, Efficiency, Effectiveness, Sustainability, and Impact. For the special purpose of this Evaluation, those criteria are further complemented with the dimension of Scalability.
2. A process-wise perspective, addressing the most important Evaluation questions outlined according to the four main operational steps of Subgranting process, namely “System Design”, “Access”, “Disbursement” and “Use”
3. A Theory of Change perspective, analysing the evidence and dynamics detected with reference to the consequential steps in the Result Chain. To further deepen this analysis and provide the project Partnership with concrete and feasible recommendations, ARCO focused also on the implementers’ ability to act and modify the different aspects of the process, according to the evolving spheres of action, control, and influence.
4. The existing preconditions as well as the direct and indirect effects triggered by the project on aspects concerning SEs’ access to broader financing opportunities.

Stream 2. Swot Analysis and risk management

- Identify external environment challenges and opportunities that had impacted on the project progress (Objective H of the ToR)
- Identify potential risks that can impact on the project due to socio-economic, political and other factors. (Objective E of the ToR).

Stream 3. Learning process and capitalization

- Identify key learnings, good practices, areas to be strengthened and provide recommendations to create a more solid basis for an evidence-based approach to promote social entrepreneurship in the Mediterranean area (Objective D of the ToR).
- Make recommendations of any knowledge products which can be prepared arising from the findings and conclusions of the evaluation. (Objective J of the ToR)

To achieve these objectives, the evaluation strategy applied different methodologies for data collection making use of a comprehensive set of tools designed in consideration of the specificities of each country involved in the MedUp! project. Data collection tools were sensitive to gender, age, urban and rural contexts, to assess to which extent the project effectively applied a gender-sensitive and overall inclusive approach.

Furthermore, the data collection and analysis was structured to consider the specificities of **all four levels of project implementation** (Micro, Meso, Macro and Regional) and all actors involved, both on the side of the implementing organizations and the beneficiaries.

Cross-cutting aspects

In addition, the Evaluation was driven by:

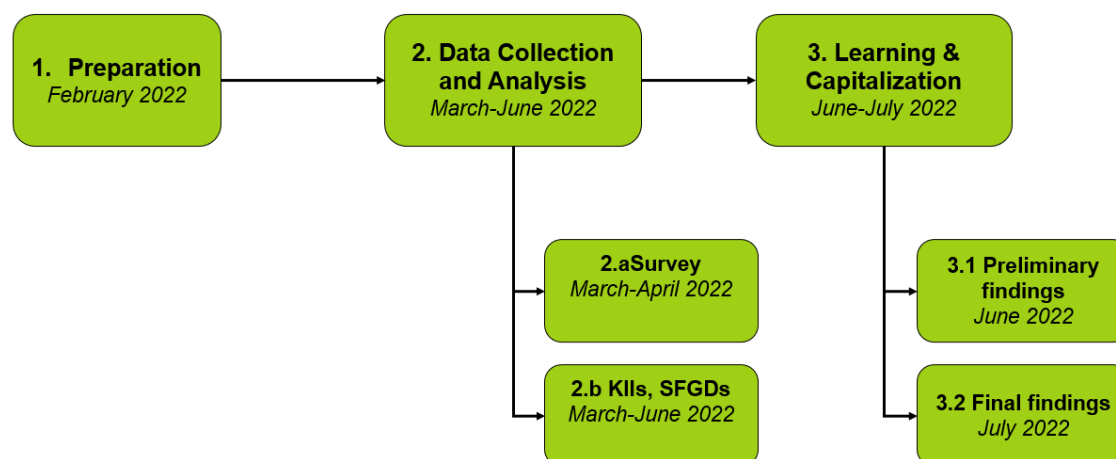
- the alignment of all Evaluation activities with the international human rights standards, consistently with the **“Human rights-based approach”** universal values set out by the 2030 Agenda for Sustainable Development, and to the **Evaluating Human Development (EHD) theoretical framework**;
- the application of an **ethical approach** to all research and data collection activities, guaranteeing the respect of the dignity and privacy of all the people involved;
- the application of proper **gender-sensitive, gender-transformative** and **diversity-sensitive** lenses throughout all the Evaluation phases and activities. Hence, the gender-sensitive and gender-transformative approach was used to capture crucial insights regarding the project contribution to gender equality and women’s empowerment, while informing on potential recommendations when applying gender mainstreaming in designing and implementing projects like MedUp!. If, on the one hand, through gender-sensitive lenses it was possible to analyse project achievements and non-achievement across genders, on the other, the application of a gender-transformative approach further broadened the scope of the evaluation. Applied by many international organizations, a gender transformative approach aims at moving beyond improvements in women’s individual well-being to delve into the **power dynamics and structures that reinforce gendered inequalities** and **investigate how they can be transformed and overcome**. Transformative change is intrinsically related to the pursuance of the three broad domains of empowerment – namely agency, relations, and structures – that **merge individual empowerment with collective commitment and political engagement** (Martinez and Wu 2009; Morgan 2014). By the same token, Kabeer (2005), building on Amartya Sen’s capability approach (see Sen, 1999), stressed that **empowerment arises from the interrelationship between agency, resources, and achievements** which, in turn, are determined by individual and collective drivers and constraints. Moreover, as underlined by Rao and Kelleher (2005) gender transformation should be investigated by addressing both **individual and systemic changes across informal and formal spheres of life**. For all these reasons, as emphasized by Kantor and Apgar (2013), applying a gender transformative approach to the evaluation (and, in general to M&E activities) means designing an evaluation framework that is **multidisciplinary, holistic, multilevel, multi-actor as well as relational-sensitive** towards changes experienced by a diverse pool of actors. All the aforementioned aspects were addressed by ARCO while designing the evaluation methodology and outlining the data collection tools. Building also on the recent **OECD-DAC guidance “Applying Evaluation Criteria Thoughtfully”** (2021), the following actions were carried out by ARCO to ensure proper assessment of the gender component during the final evaluation:

- Ensuring gender balance in the sample selection for data collection activities;
- Involving key actors who could specifically inform on the project contribution on gender equality and empowerment, with particular focus on women entrepreneurship;
- Using an inclusive and gender-sensitive language;
- Designing data collection tools in such a way to capture gender-related insights and gather data disaggregated by gender;
- Addressing all the evaluation questions through gender-sensitive and gender-transformative lens;
- Adding specific evaluation questions to delve into the project contribution to gender equality and empowerment given a gender-transformative framework
- Formulating specific recommendations based on gender insights so as to promote the application of a gender-transformative approach to future interventions.

Evaluation Phases

The three different phases followed by ARCO's researchers during the Final Evaluation were the following: 1) **Preparation**, 2) **Data Collection and Analysis**, and 3) **Learning & Capitalization**.

Main Evaluation Phases



Source: ARCO

All the phases were driven by a **participatory approach** to the Evaluation activities. Moreover, most of the data collection and analysis activities were carried out **remotely**, using reliable web-conferencing platforms. In addition, the Evaluators took part in one two project events, namely the **Peer Review Event in Brussels** (June 14th-15th, 2022), during which they carried out additional Key Informant Interviews to project stakeholders, and the **Final Coordination Meeting** in Florence, Italy (June 27-29th, 2022).

Phase 1. Preparation

The Inception Report was the main output of Phase 1 and aimed at building a common understanding of the objectives, methodology, timing, and tools of the evaluation with the Oxfam IT and MedUp! Consortium. Therefore, thanks to the validation process carried out by the project implementors, consistency with the local contexts and adherence to MedUp! Partners' expectations was ensured.

At the end of this phase, MedUp! Consortium provided ARCO with all the needed project documentation to perform the desk analysis.

Phase 2. Data collection and analysis

ARCO planned the Data Collection and Analysis Phase into two main sub-phases, namely:

- **Phase 2.a:** Online Survey
- **Phase 2.b:** KIs and Structured Focus groups (on the field and remote).

The following table summarizes the main features of each sub-Phase:

Overview on Phase 2.1 and 2.2

Data collection & analysis phase	Period	Tools and activities	Remote/ On-Field	Target groups
Phase 2.a	April 6th-May 10th 2022	Online survey	Remote	SEs
Phase 2.b	April-June 2022	KIIs, SFGDs	Remote and on-field	SESOs technical staff, Policymakers, Project staff/implementors, SEs

Source: ARCO

Phase 2.a: Survey

Micro-level achievements of the project were assessed by collecting data through an online questionnaire which was administered to all 64 project beneficiary Social Enterprises, after the accomplishment of the KIIs with the internal project stakeholders. The questionnaire took into account gender, age and urban/rural differences to provide disaggregated data.

The following table summarizes the key aspects related to the survey:

Overview on the survey for Social Entrepreneurs

Method	Data Collection Tool	Target Group	Type of Data
Survey questionnaire	Online questionnaire	64 Social Enterprises <i>sample size: full coverage (100%) of existing enterprises</i>	Quantitative and qualitative
Objectives			
<p>The survey aimed at reaching the following objectives as per the ToR:</p> <ul style="list-style-type: none"> A. Identify, assess and document the evidence for the achievement of expected and unexpected results of the project towards the intended outcomes following the two levels of intervention (Meso and Micro). C. With particular reference to the sub-granting component of the project (1 million Euro as grants to local social enterprises), assess the effectiveness of this financial support and elaborate key recommendations. In particular, it was assessed whether the project made a “smart” use of the sub-granting component and tented to go beyond the classic approach by pushing towards the exploration of innovative financing mechanisms other than pure grants. Assess whether the sub-grantees have improved or perceived to have improved their confidence in managing, in the future, more complex financial products. D. Identify key learnings, good practices, areas to be strengthened and provide recommendations to create a more solid basis for an evidence-based approach to promote social entrepreneurship in the Mediterranean area. E. Identify potential risks that can impact the project due to socio-economic, political and other factors. H. Identify external environment challenges and opportunities that had impacted the project progress. 			
Practical organization			
<ul style="list-style-type: none"> - The questionnaire was administered in English, French and Arabic through Alchemer, a professional online survey platform; - A pilot test was conducted with 3 social entrepreneurs (selected by the national PMUs), to verify the quality and robustness of the questionnaire and validate it for all three languages of administration. The provided feedback was used by ARCO to finalize the questionnaire; 			

- Once validated, ARCO provided the PMUs with the link to the online survey;
- Each PMU sent the survey link to the supported SEs in their Countries, while ensuring their self-administration of the questionnaire, in the specified time frame;
- An Arabic-speaking interviewer was available to administer the questionnaire via virtual/phone call to the respondents that faced difficulties with the online self-administration.

Survey respondents & research limitations

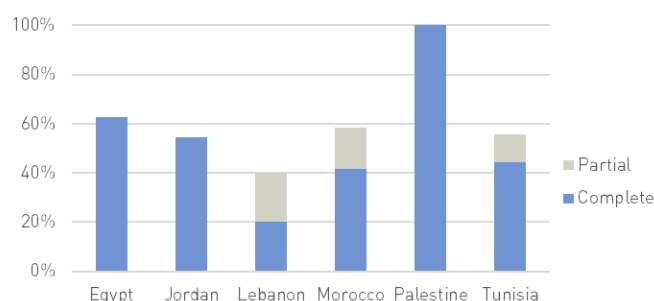
The SE survey opened on **April 6th, 2022**, and was originally intended to close on **April 28th, 2022**. However, due to the low response from beneficiary SEs, it was commonly agreed with the Consortium to extend the deadline to **May 10th, 2022**. Unfortunately, and despite the many reminders by the project staff, the survey still closed with a low response rate.

A total of **40 survey responses** out of 63 project beneficiary SEs were recorded. Of these, however, 5 were only partially filled which left only **35 complete surveys**. Hence, given the moderated response rate (59%) results of the survey are partially representative of the targeted group. Additionally, **only 26 respondents** could be matched with the MTE for the comparative analysis. Moreover, the evaluators warn of a **potential selection-bias** resulting in survey respondents being among the most engaged project beneficiaries.

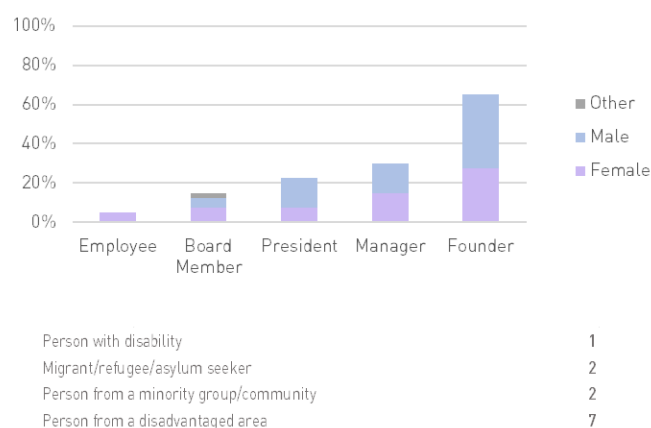
Figures below provide an overview of the survey response rate by project country and of the survey respondents' profiles.

*Figure 26. Overview on the SE respondents to the final evaluation survey
Percentage distribution of the survey respondents as for the reported items (N=40)*

Respondents by country



Respondents' profile



Source: ARCO's elaboration on data extracted from the Final Evaluation survey for MedUp! Social Enterprises

Phase 2.b Key Informant Interviews and Structured Focus Group Discussions

This phase encompassed two different data collection methods, each one employing a different data collection tool pursuing specific evaluation objectives, namely **semi-structured one-to-one interviews to Key Informants (KII)** and **Structured Focus Group Discussions (SFGD)**. In this phase, activities were mainly implemented remotely, while some KII even on-field. The overall strategy for this Phase is summarized in the figure below.

Key informant interviews (KIIs)

The KIIs were useful to gain a better understanding of the context of the intervention, the changes undergoing in the countries, the status of the work, the main challenges faced, the positive and negative dynamics, the lessons learnt, and the best practices. Even if interviewers followed a set of prepared questions, further questions arose during the discussion and additional information or comments by the interviewees were always welcomed. Interviews were customized and conducted accordingly to the role and expertise of the involved stakeholder.

The following table provides an overview of the KIIs.

Overview of Key Informant Interviews (KIIs)

Method	Data Collection Tool	Target Group	Type of Data
Individual interviews	Semi-structured one-to-one interviews (via virtual call) <ul style="list-style-type: none"> Project external stakeholders: Target: N=18 (3 for each MedUp! country) Internal Stakeholders (project staff and Partners): Target: N= 14 European Commission (EC) Project Officer: Target: N=1 	<ul style="list-style-type: none"> Regional Project Manager Thematic Coordinators and Technical Advisors (Diesis, Euclid Network, Impact Hub and Oxfam Novib) Gender Advisor MEAL advisor Finance Manager National Project Management Unit (PMUs) Staff (Oxfam Affiliated entities + Southern Mediterranean Co-applicants) European Commission (EC) Project Officer Project external stakeholders (i.e., Policymakers, financial institutions, other local stakeholders), identified in coordination with PMUs 	Quantitative and qualitative
Objectives			
Semi-structured interviews focused on reaching the following objectives as per the ToR:			

- A. Identify, assess and document the evidence for the achievement of expected and unexpected results of the project towards the intended outcomes following the two levels of intervention (Meso and Micro).
- B. Assess the relevance, coherence, effectiveness, efficiency, sustainability and scalability of the project related to contribution to partnerships, accountability, value for money from the perspectives of different stakeholders, capacity to generate mid-term impact and development processes that continue after the project duration. This included the appropriateness and relevance of the beneficiary selection.
- C. With particular reference to the sub-granting component of the project (1 million Euro as grants to local social enterprises), assess the effectiveness of this financial support and elaborate key recommendations. In particular, it was assessed whether the project made “smart” use of the sub-granting component and tented to go beyond the classic approach by pushing towards the exploration of innovative financing mechanisms other than pure grants. Assess whether the sub-grantees have improved or perceived to have improved their confidence in managing, in the future, more complex financial products.
- D. Identify key learnings, good practices, areas to be strengthened and provide recommendations to create a more solid basis for an evidence-based approach to promote social entrepreneurship in the Mediterranean area.
- E. Identify potential risks that can impact the project due to socio-economic, political and other factors.
- F. Assess whether the management and governance structure of the project was fully functional to reach the project’s objectives.
- G. Assess the existing strategies for sustaining the project’s results and recommend measures for new similar projects. This was linked with the governance structure, decision-making process, project implementation modality, etc.
- H. Identify external environment challenges and opportunities that had impacted the project progress.
- I. Advice about possible and applicable measures and decisions that could have increased the project’s capacity to develop activities at Macro, Meso and Micro levels that are sustainable and well anchored to national and regional social entrepreneurship ecosystems.
- J. Make recommendations of any knowledge products which can be prepared arising from the findings and conclusions of the evaluation.

Practical organization

- ARCO contacted PMUs to jointly identify the Project external stakeholders (i.e., Policymakers, financial institutions, other local stakeholders) to be interviewed;
- ARCO provided a **contact detail template** form to PMUs for the collection of interviewees’ contact details;
- ARCO provided an **email template** (in English, French and Arabic) for PMUs to reach out to identified stakeholders to be interviewed;
- In order to optimize the planning of the KIIs in each country, ARCO asked for the active support of each PMUs. In particular, ARCO shared with the PMUs an online calendar where PMUs indicated the chosen date and time for the interviews (both interviews with PMU staff members and project external stakeholders in their respective country). Similarly, ARCO shared the online calendar with all other project staff and partners for them to autonomously insert the chosen date and time for the interviews. ARCO then sent the link for the online call to the interviewees based on the contact information collected by the PMUs;
- An Arabic-speaking interviewer was available in case interviewees did not feel confident in carrying out the interview in English or French.

Methodology

Semi-structured interviews were aimed at gaining a better understanding of the context of the intervention, the changes undergoing in the countries, the main challenges faced, the positive and negative dynamics, the lessons learnt, and the best practices. Even if interviewers had a set of prepared questions, ARCO left interviewees free to provide additional information and comments. Moreover, interviews were customized and conducted accordingly to the role and expertise of the involved stakeholder. Interviews to the PMUs representatives (2 max per PMU) were carried out collectively in order to ensure representativeness of both the Oxfam country offices and the project local partners.

Research limitations

Interviews with the project staff and EU representative were carried out from **March 30th to April 20th**. A total of **19 interviews** to 27 project staff were carried out, against the 14 planned. In some cases, communication with the project PMUs in scheduling the interviews was quite slow, requiring considerable coordination efforts on the part of the evaluators.

Interviews with project external stakeholders were carried out from **April 8th to June 15th, 2022**. Coordination with PMUs to identify the respondents and to provide their contacts was fundamental, albeit it took some time and reminders. A total of **15 interviews** were carried out, against 18 planned, as some respondents were difficult to engage or did not provide their availability. Regarding the typology of stakeholders to be interviewed the evaluators had strongly encouraged PMUs to identify engaged policy-level actors and financial institution representatives as preferable targets for the interviews. However, no Lebanese policy-level actor could be available and only one Palestinian financial institution representatives was interviewed.

Source: ARCO

Structured Focus Group Discussions

Overview on Structured Focus Group Discussion

Method	Data Collection Tool	Target Group	Type of Data
Participatory method	Structured Focus Group Discussions N= 3	<ul style="list-style-type: none">• SESO technical staff (sample of 6-8 individuals at least one from each country)• National PMUs (one for each country)• SEs (sample 6-8 individuals with at least one for each partner country)	Qualitative

Objectives

The SFGDs had the aim of reaching the following objective as per the ToR:

B. Assess the relevance, coherence, effectiveness, efficiency, sustainability, impact and scalability of the project related to contribution to partnerships, accountability, value for money from the perspectives of different stakeholders, capacity to generate mid-term impact and development processes that continue after the project duration.

C. With particular reference to the sub-granting component of the project (1 million Euro as grants to local social enterprises), assess the effectiveness of this financial support and elaborate key recommendations. Assess whether the project made a “smart” use of the sub-granting component and tented to go beyond the classic approach by pushing towards the exploration of innovative financing mechanisms other than pure grants. Assess whether the sub-grantees have improved or perceived to have improved their confidence in managing, in the future, more complex financial products.

Methodology

As agreed in coordination with Oxfam IT, all three SFGDs were carried out **remotely** on Zoom platform, due to logistical challenges in integrating the evaluation activities in the dense agenda of the project events taking place in May and June 2022.

Structured Focus Group Discussion with beneficiary SEs and SESOs

The Structured Focus Group Discussions (2 hours long) carried out with project beneficiary SEs and SESOs from all partner countries mainly focused on assessing the effects of MedUp! support, detecting their needed future support and delving into their key challenges and opportunities related to the different forms of financing.

Structured Focus Group Discussion with project PMUs

The Structured Focus Group Discussions (2 hours long) carried out with project PMUs from all partner countries mainly focused on collectively reflect on MedUp! Strengths and Weaknesses that have influenced the project relevance, effectiveness, efficiency and potential impact, as well as on key Opportunities and Threats that may influence MedUp! future sustainability, scalability and impact (**SWOT analysis**).

Moreover, the SFGD aimed at jointly reflecting on the most binding obstacles for SEs' access to finance in the MENA region as well as on MedUp! contribution to facilitate SEs' access to finance and identifying the most important aspects to be tackled in future projects.

Finally, the collective discussion built on the definition of Gender Transformative approach to support participants in jointly identifying potential adjustments and improvements to better translate this approach into actions in future interventions.

FGD participants & research limitations

Focus Group Discussion with SEs

The SFGD with beneficiary SEs was carried out on **May 31st, 2022**. A total of **5 SE representatives** participated from all partner countries **apart from Jordan and Lebanon**.

Focus Group Discussion with SESOs

The SFGD with beneficiary SEs was carried out on **June 1st, 2022**. A total of **5 SE representatives** participated from all partner countries **apart from Lebanon, Morocco and Tunisia**.

Finally, for both SFGDs with SEs and SESOs, the evaluators warn of a potential selection-bias resulting in participants being among the most engaged project beneficiaries.

Focus Group Discussion with PMUs

The SFGD with PMUs was carried out on **May 30th, 2022**.

A total of **8 PMU representative** from all partner countries participated to the SFGD.

Source: ARCO

The following table provides an overview of the data collection activities and respondents that were actually carried out and engaged against the original evaluation agenda.

Data collection activities and respondents

	EGYPT	JORDAN	LEBANON	MOROCCO	PALESTINE	TUNISIA
INTERVIEW WITH COUNTRY PMUS	✓	✓	✓	✓	✓	✓
INTERVIEW LOCAL STAKEHOLDERS	✓ (3)	✓ (2)	✓ (3)	✓ (3)	✓ (3)	✓ (2)
FGD WITH SESO REPRESENTATIVES	✓ (2)	✓ (1)	⊘	⊘	✓ (2)	⊘
FGD WITH SE REPRESENTATIVES	✓ (1)	⊘	⊘	✓ (2)	✓ (1)	✓ (1)
PARTICIPATION TO TRANSNATIONAL FGD WITH PMUS	✓ (2)	✓ (1)	✓ (1)	✓ (1)	✓ (2)	✓ (1)
SE SURVEY RESPONDENTS	63% (7)	55% (6)	40% (4)	58% (8)	100% (14)	56% (5)

Source: ARCO

Phase 3. Learning and Capitalization

Phase 3 was divided into two sub-phases, namely:

- **Phase 3.1:** Preliminary findings
- **Phase 3.2:** Final report

During **Phase 3.1**, based on data collection activities, ARCO elaborated the **Preliminary Findings Report** and a synthetic **PowerPoint presentation** which was presented by during the project **Final Coordination Meeting** in Florence on June 27th-29th. Drawing from the preliminary findings of MedUP! Final Evaluation, the Evaluators identified **key topics** to bring to the Consortium's attention to stimulate a collective reflection during the Final Coordination Meeting. The ultimate aim of such collective learning and capitalization process was to feed key recommendations for future intervention. To facilitate the collective discussion, the evaluators elaborated **key guiding questions** and hinted possible strategies and examples based on the findings of MedUP! Final Evaluation.



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Annex 2_ Evaluation ToR



This project is co-funded
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Promoting social entrepreneurship in the Mediterranean Region

MedUP! Promoting social entrepreneurship in the Mediterranean region

Reference: EuropeAid/155554/DH/ACT/Multi

Terms of Reference (ToR)

For

Final External Evaluation of the Project

List of acronyms

EU:	European Union
INGOS:	International non-governmental organizations
M&E:	Monitoring and evaluation
MENA	Middle East and North Africa
OECD-DAC:	Organization for Economic Co-operation and Development - Development Assistance Committee
PWDs:	People with disabilities
SE:	Social enterprises
SESOs:	Social entrepreneurship support organisation services

A. BACKGROUND

1. The project

1.1. Project summary

DURATION: 4 years, from 1 March 2018 to 28 February 2022

COUNTRIES: Morocco, Tunisia, Egypt, Palestine, Jordan and Lebanon

PARTNERS

Consortium Leader: Oxfam IT

European Organizations: DIESIS, Euclid Network, Impact Hub International.

Oxfam Country EA: Oxfam Novib (ONL) in Palestine, Tunisia and Egypt; Oxfam Great Britain (OGB) in Lebanon and Jordan; Oxfam Intermon (OES) in Morocco.

Mediterranean Countries Organizations: Sekem Development Foundation in Egypt, Tunisian Center for Social Entrepreneurship in Tunisia, Jordanian Hashemite fund for Human Development in Jordan, Enactus in Morocco, Agricultural Development Association (PARC) in Palestine.

Associated: Tuscany Region, Autonomous Region of Sardinia, Banca Etica, Associazione Imprenditrici e Donne Dirigenti di Azienda (AIDDA).

1.2. Intervention logic

Global objective: to promote an enabling environment in the Southern Mediterranean partner countries for the development of the social entrepreneurship sector as a driver for inclusive growth and job creation.

Specific objective: to increase economic inclusiveness and employment in Morocco, Tunisia, Egypt, Lebanon, Jordan and Palestine where adequate policies on social entrepreneurship are in place, public-private dialogue and exchanges of practices are promoted and high-quality services for social enterprises (SEs) are provided.

<p><u>Intermediary Outcome n.1:</u> Policy makers and key private and public stakeholders at local, national and regional levels are actively engaged in improving youth and gender sensitive policies and legal frameworks on social entrepreneurship.</p>	<p><u>Op1.1</u> One national survey of key SE priorities, regulations and actors will be held for each country with the objective to have a clear and updated overview on priority issues and actors involved in the social entrepreneurship sector and the differential impact on gender in each targeted country. <u>Op1.2</u> Policy and regulatory frameworks at national level are strengthened mainly through advocacy activities. <u>Op1.3</u> Barriers entrepreneurial young women face in the MENA region are compared and contrasted</p>
<p><u>Intermediary Outcome n.2:</u> Quality and accessibility of support services for SEs and coordination among social entrepreneurship support organizations are increased</p>	<p><u>Op2.1</u> Sixty Social Entrepreneurship Support Organisations (SESOs) are trained in business development, SE innovation and social business technical assistance in order to be able to effectively support SEs to grow and scale up in a sustainable way <u>Op2.2</u> Peer-to-peer learning, networking and partnership are facilitated among North-South and South-South key counterparts in order to build cross-border networks, share best practices and stimulate learning</p>
<p><u>Intermediary Outcome n.3:</u> Existing social enterprises expand their businesses and awareness of their impact is well spread among public audiences</p>	<p><u>Op3.1</u> One hundred SEs become more financially and socially sustainable and able to scale up <u>Op3.2</u> Best practices on social entrepreneurship are widely disseminated among national, regional and international audiences for replication</p>

1.3. Levels of intervention

MedUp! is a multicounty project with a strong regional dimension that is rooted on 6 different and specific contexts. The MedUp! strategy is implemented following the 3 levels of intervention below:

- At macro level, the Action will promote policy and advocacy initiatives and public-private dialogue to improve regulatory and policy environments at country and cross-country levels;
- At meso level, SESOs will be supported to improve the quality, innovativeness and outreach of their services targeting local SEs. This will be done through capacity building programs, establishing strategic alliances with local and international financial institutions and organizing exchange and networking events with counterparts in the Southern Neighbourhood and the EU;
- At micro level, the Action will assist social enterprises in targeted countries through appropriate financial and technical support and on disseminating promising and successful social enterprises at national, regional and EU level to help SEs grow and diversify and also to feed the advocacy work (at macro level) through evidence.

In general, the Action will stimulate the participation of key relevant actors at national, regional and EU level to develop an enabling social entrepreneurship ecosystem in each targeted country.

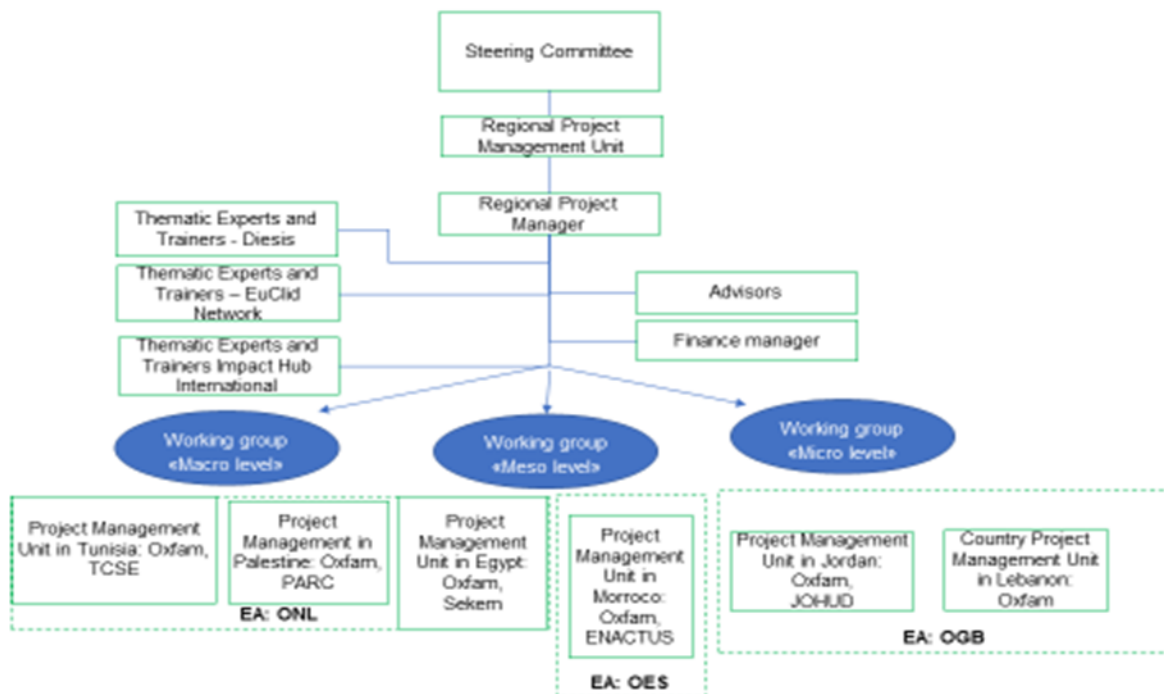
1.4. Beneficiaries

The project implementation has two main management structures' levels:

- 1) Regional level: 1 Regional Project Management Unit is established and composed of a Regional Project Manager, Thematic Coordinators, Gender Advisors, MEAL advisor, Finance Manager;
- 2) National level: 6 National Project Management Units (PMUs) are in charge of the implementation of activities in each country of intervention.

In terms of Governance, there is a Steering Committee in charge of providing strategic steers for an effective implementation of the project. The Steering Committee is composed of members of each partner and from countries.

Below is an organogram of the project implementation team:



1.5. Beneficiaries

Target groups

Target groups

- 1) 64 existing social enterprises that show a scalable model, are sustainable and generate a positive and long-term impact on their territories. Particular attention will be given to SEs that are women and/or youth-led or which create jobs for young people and women especially in rural areas;
- 2) 60 SESOs - estimated 480 technical staff - working closely with SEs and willing to improve the quality of their services through innovation and adaptation;
- 3) Governments officials and policy decision makers see a potential in SEs as drivers for inclusive growth and want to improve their policies and regulatory frameworks.

Final beneficiaries of the Action will be:

- Targeted youth, women and their households (est. 8.000 people);
- Media and influencing institutions, governmental bodies and main donors, educational institutions, private companies and investors and financial institutions.

(Refer Annex 1: MedUp! project's Logical Framework for details)

2. Project implementation

In the wake of the pandemic, the Action has worked hard to turn the challenges into opportunities: *first*, the Consortium was committed in becoming a strong and close community itself, supporting each other during the difficult times; *secondly*, the Consortium addressed the challenge directly through various offerings: providing tailored technical and financial support to social enterprises, engaging with policy makers to constructively discuss about SE policy initiatives, organizing thematic sessions for SESOs on collaborative responses to COVID, on how to reach financial sustainability strategy in the midst of the Covid-19 pandemic, etc. *Third*, strong bonds were established with MedUp! partners with the aim to sustain the positive path even after the end of the Action. The third year's achievements of the project fundamentally consisted in mapping, convening, assessing and engaging the main actors of the six social entrepreneurship ecosystems, reaching tangible outcomes that ensure sustainability and scalability of SEs in target countries.

All results achieved at the Micro and Meso levels starting to scale up clearly and are creating great potential at the Macro level where the appetite among policy makers as well as communities, for impact driven enterprises has opened up.

More specifically, the third year of MedUp focused on the following activities:

- at micro level: MedUp! continued to financially and technically support the 64 social enterprises. In particular, all the sub-granting funds are in the process of being disbursed in tranches (in the upcoming months, disbursements will be completed) and the technical support to SEs was provided in different complementary forms including workshops, trainings, mentorship, consultation, and access to labs. Synergies with other EU-funded and non-projects (e.g. Trait d'Union, JoinUp!, etc.) and relevant national initiatives were created to maximize the impact and widen the reach of the SEs;
- at meso level: capacity building and networking activities with SESOs were shifted to online modalities. The project teams worked continuously with the SESOs on identifying the main issues regarding these challenges and proposing new ways of working in order to ensure the implication of the SESOs. The onset of the pandemic caused a significant disruption to the ongoing exchange activities: the planned trips and in-presence events (trainings and peer exchanges) have been cancelled. In order to maintain a high level of SESOs' peer engagement, additional virtual activities/webinars were proposed. A Facebook group for peers and PMU representatives was set up to serve as a more informal networking and knowledge exchange platform;
- at macro level: more emphasis was done on the advocacy side by continuing raising awareness of the public opinion and decision makers regarding the challenges faced by the SE ecosystems as well as their potential in terms of growth through workshops and coffee talks. Indeed, the Covid-19 crisis represented also an opportunity to shed light on the important role of SEs for inclusive socio-economic development. The first study visit coordinated by Diesis was supposed to take place in Madrid in April 2020 and it was organized as an on-line event in June-July 2020. Almost all the organizations that had been contacted for the study visits were asked to participate in the 3 on-line events. On the gender component, a regional

research was finalized and approved by PMUs. It was presented at the partnership meeting in Tunisia where the initial plans for gender advocacy were developed. It was used as the basis of next advocacy steps at the macro level. A gender advocacy plan was developed with participation from all countries. A [blog](#) was written on the experience and potential for a gender transformative approach for all advocacy efforts.

B. FINAL EVALUATION

MedUp! project is approaching now the last months of the activities and the closure of the project activities. Considering the importance of project for the partners and in order to assess whether the action has been successful in achieving its expected results, there is the need to undertake a comprehensive evaluation exercise to analyse the project's performance by looking at practices and ways of working at macro, meso and micro level. The final external evaluation is intended to assess whether targets and outcomes have been achieved within the project timeframe and to get useful learnings from the implementation of the project. For this purpose, Oxfam Italia is looking for a consultant/s or consultative firm or a research centre (henceforth provider) with relevant experience in conducting assessment exercises of social business actions and complex programs in the MENA region.

3. Purpose

The MedUp! final external evaluation (henceforth evaluation) aims at assessing the a) relevance, b) coherence, c), effectiveness, d) efficiency e) sustainability of the project against its overall objective and the main outcomes, consistently with OECD-DAC evaluation criteria. It will also assess the scalability of the project and its factual contribution towards the operationalization of a regional social entrepreneurship ecosystem. Therefore, the present evaluation has the purpose to assess the **quality of the implementation** of the project and to highlight **key learnings** coming from project where the development of social entrepreneurship can contribute to increase economic and social inclusion and job creation especially for women and youth in targeted countries of the action. Overall, the scope is to assess and learn from the sub-granting mechanism for social enterprises (including monitoring of the business supported) as part of a larger and more ambitious intervention to promote proper access to finance for social entrepreneurs. In addition, the scope is to get learning from the support and guidance (technical assistance) provided to social entrepreneurs during the implementation of their projects. Finally, the evaluation will assess the performance and sustainability of the national networks created within the project as well as the synergies with other actions operating in the MENA region.

The evaluation purpose is focused on both accountability and learning. Therefore, the main evaluation questions are the following:

A. Relevance.

Assessing relevance means understand if the intervention objectives and design respond to beneficiaries', regional, country, and partner/institution needs, policies, and priorities, and continue to do so if circumstances change. Questions to consider are: *Has the theory of change, vision, purpose of the project been validated by the activities implemented so far? Were the objectives and design of the project relevant given the political, economic, and financial context? To what extent are the objectives of the program still valid? To what extent the project has been able to adapt to the changing regional environment also in light of the COVID-19 pandemic?*

B. Coherence.

Assessing coherence means analyse the compatibility of the project with other interventions in a country, sector or institution. Questions to consider are: *To which extent other interventions support the project? How innovative*

and strategic is the project in comparison with similar initiatives internationally? Are there any reflected good practice and does it remain relevant in the face of evolving similar concepts and approaches at local, national and regional? Which is the consistency of the project with other actors' interventions in the same context?

C. Effectiveness.

Assessing effectiveness implies measuring if the project achieved, or is expected to achieve, its objectives and results, including any different results across groups. Questions to consider are: *To which extent intended outcomes of the project have been achieved? Any unintended outcomes? What were the direct results of the project on beneficiary institutions which can be detected in terms of their potential contribution to increase economic and social inclusion and job creation in the targeted countries? To which extent the multilevel approach (i.e. micro, meso and macro) has been effective to support the social entrepreneurship in Mediterranean area? Which was the added value in working regionally on social business? Has the action reached the expected number of beneficiaries? Are the beneficiaries satisfied with the quality and delivery of services along the three levels? How has MedUp! partners responded to challenges? What has been the effect and value of the activities to improve the conditions for the development of social entrepreneurship both nationally and regionally? What project partners and key stakeholders (i.e. SESOs, social enterprises, national and subnational governments, partners, and project/regional management units) learnt from the project implementation especially in terms of access to finance for social entrepreneurs?*

D. Efficiency.

Assessing efficiency means measuring if the project delivers, or is likely to deliver, results in an economic¹ and timely way. The focus of this assessment should be on cost-benefit analysis. Questions to consider are: *What were costs-benefits of the delivery of project activities? Were the lead and implementing partners efficient in the delivery of the activities in the project? Was the use of grant funds adequate to strengthen social business?*

E. Sustainability.

Assessing sustainability means measuring if net benefits of the intervention continue, or are likely to continue. It includes an examination of the financial, economic, social and institutional capacities of the project to sustain net benefits, over the time. Questions to consider are: *To what extent the benefits of a project continue after donor funding ceased? What were the major factors that influenced the achievement or non-achievement of sustainability of the project? Are the perspectives and priorities of women and young people addressed across all the project activities? Are the social enterprises supported by the project financially and socially sustainable? Did the project activate positive dynamics for social enterprises to act sustainably in their ecosystems? (especially with reference to linkages with financial institutions)*

F. Scalability.

Assessing scalability means understanding the key elements that could, in the future, bring the project to scale. Questions to consider are: *Is there evidence that the project is likely to grow -scaling in the current beneficiaries' countries and replicating in other non-current beneficiaries' countries – through future projects? Which are the possible scalable elements? What would be the relevant area and beneficiaries? Who would be the potential partners? What would be the magnitude of investment to make scalability or replication possible?*

In light of the support that the Tuscany Region provided to MedUp!, the evaluation will also include some beneficiaries and stakeholders of the project *Trait d'Union* in Tunisia, funded by the Italian Ministry of Interior and led by the Tuscany Region. The idea is to include in the final evaluation also the perspective of other people/organizations as to understand how MedUp! outputs and achievements could be of support for and in synergy with the activities carried out in the initiative *Trait d'Union*.

¹ "Economic" is the conversion of inputs (funds, expertise, natural resources, time, etc.) into outputs, outcomes and impacts, in the most cost-effective way possible, as compared to feasible alternatives in the context (OECD-DAC).

4. Objectives

- A. Identify, assess and document the evidence for the achievement of expected and unexpected results of the project towards the intended outcomes following the two level of intervention (meso and micro).
- B. Assess the relevance, coherence, effectiveness, efficiency, sustainability and scalability of the project related to contribution to partnerships, accountability, value for money from the perspectives of different stakeholders, capacity to generate mid-term impact and development processes that continue after the project duration. This can include the appropriateness and relevance of the beneficiary selection.
- C. With particular reference to the sub-granting component of the project (1 million Euro as grants to local social enterprises), assess the effectiveness of this financial support and elaborate key recommendations. In particular, it will be important to assess whether the project made a “smart” use of the sub-granting component and tented to go beyond the classic approach by pushing towards the exploration of innovative financing mechanisms other than pure grants. Assess whether the sub-grantees have improved or perceived to have improved their confidence in managing, in the future, more complex financial products.
- D. Identify key learnings, good practices, areas to be strengthened and provide recommendations to create a more solid basis for evidence-based approach to promote social entrepreneurship in the Mediterranean area. Therefore, the evaluation has to determine the reason why certain changes occurred or not at project level, synthesize what worked and not work and why, draw lessons, derive good practices and pointers for learning.
- E. Identify potential risks that can impact on the project due to socio-economic, political and other factors.
- F. Assess whether the management and governance structure of the project was fully functional to reach the project’s objectives.
- G. Assess the existing strategies for sustaining the project’s results and recommend measures for new similar projects. This can be linked with the governance structure, decision making process, project implementation modality, etc.
- H. Identify external environment challenges and opportunities that had impacted on the project progress.
- I. Advise about possible and applicable measures and decisions that could have increased the project’s capacity to develop activities at macro, meso and micro levels that are sustainable and well anchored to national and regional social entrepreneurship ecosystems.
- J. Make recommendations of any knowledge products which can be prepared arising from the findings and conclusions of the evaluation.

The evaluation findings and recommendations will be used as a basis for well-grounded strategic reflection by Oxfam for future support and involvement with similar initiatives.

5. Geographical area

The project is implemented both in rural and urban area of the following Middle East and North African (MENA) countries: Morocco, Tunisia, Egypt, Palestine, Jordan, Lebanon.

The final external evaluation will be done by combining work on remote and in the target areas, if the COVID-19 pandemic will allow it. The field-visits will have the purpose of collecting data from partners, stakeholders and beneficiaries in the region. Per each country of implementation, a stakeholder’s map will be made available to the selected provider. Considering the support from Tuscany Region, in case travels to target countries will be possible, Tunisia should be considered with priority for field missions.

The evaluation proposal must describe how to collect data from beneficiaries and local stakeholders, if field mission is not possible due to the COVID-19 restrictions.

Considering that the duration of the project will be extended until August 2022 and to facilitate a proper planning of the field missions, here below a table showing the official end of activities per each country is reported:

Country	New end of the project (as part of the NCE)
Morocco	August 2022
Tunisia	August 2022
Egypt	February 2022
Lebanon	August 2022
Jordan	June 2022
Palestine	May 2022

(Refer Annex 2: List of the local partner and stakeholder)

6. Evaluation approach and methodology

To select the provider in charge of conducting the final external evaluation, Oxfam Italia expects to receive clear technical and financial proposals clarifying the following:

6.1. Approach

- A. Evaluation will employ both qualitative and quantitative methods for data collection supported by an extensive review of secondary information on issues that are relevant to the project (i.e. social business, economic and social inclusion, service support, women economic empowerment among others).
- B. Evaluation will be conducted using semi-structured questionnaire/s (SSQ), Key Informant Interviews (KIIs), Focus Group Discussions (FGDs). All the mentioned research tools must be gender sensitive. Per each data-collection methodology, the provider must develop specific questionnaire/guidelines that will be made available as annexes in the final report. The information so gathered will be triangulated to obtain a more accurate picture.
- C. The data collected on the ground, both in urban and rural areas, should show segregation of beneficiaries by gender and age, and it has to be carried out in at least three (3) countries where the project is implemented as described under section 5. The 3 countries will be identified with the Regional Management Unit, in agreement with Tuscany Region. For the countries not included in the field visits, the data collection will be done remotely and in close coordination with the interested PMUs. The proposal has to illustrate the methodology of collecting field data from partners, stakeholders and beneficiaries.
- D. In conducting the evaluation, the provider must be in constant coordination with the Regional Project Management Unit (especially with the MedUp! MEAL Advisor and the Regional Project Coordinator). As part of the technical proposal submitted, the provider has to propose a plan to make sure the necessary coordination will be ensured.
- E. Outline Oxfam's focus on gender and inclusion with a specific focus on what this means in the context of this evaluation's focus. In line with Oxfam's values and organizational ambition, the evaluation should seek to prioritize a focus on gender and inclusion and trying to understand the extent to which the project or program applied gender-sensitive and inclusive approaches and explicitly aimed for results that improve the rights of all groups and that contribute to gender justice.

- F. Evaluation will adopt a context-specific approach in order to better capture and delineate the specificities of the targeted countries for creating an inclusive, more connected and better resourced social entrepreneurship eco-system in Mediterranean area.

6.2. Methodology

- A. Review project documents (e.g. the project proposal, Log Frame, M&E Plan, technical note, and other materials elaborated by project teams and partners) and carry out preliminary interviews with the relevant staff. Review the existing M&E tools in each country to ensure they capture data sufficiently.
- B. Develop detailed evaluation Proposal and Inception Report along with the questionnaires, methodologies and work plan.
- C. Upon approval of the Evaluation proposal / Inception report, collect data at field level and remotely as per schedule, interpret and analyze them. Pay extra attention to data related to gender while collecting data and reporting on findings.
- D. Review the information available in the project and progress reports (annual) generated by project staff.
- E. Assess the relevance, coherence, efficiency, effectiveness, sustainability and scalability of the project (by using indicators) as to whether it is consistent the intended outcomes. Use country analysis data, information against the indicators, and perspectives provided by stakeholders through key informant interviews / focus group discussion as a basis for the evaluation team's assessment.
- F. Identify the reasons for eventual and unexpected delays.
- G. Capture the evidence for the project's achievements in the form of case studies too.
- H. Review the project management style and provide recommendations for greater efficiency.

6.3. Sampling methodology and sample size

The intended total number of final beneficiaries of this project is 8.000 people. The provider is expected to propose a methodology and sample for the evaluation within its proposal.

7. Responsibilities of the provider

The provider is required to:

- A. Take the responsibility for the evaluation and appoint a person as the contact point with Oxfam Italia Italia for all the liaison and coordination;
- B. Compose the evaluation team that is capable to deliver the quality outputs in a timely manner and mention the team composition in his / her proposal;
- C. Make necessary appointments for the key informant interviews, mobilize participants, including direct beneficiaries (mainly social entrepreneurs, social enterprises support organizations, policy makers), for focus group discussions and visit the partners for data collection. The project staff in the country (i.e. PMUs), however, would support and participate at FGDs. Oxfam in countries will provide necessary authorizations through letters to use the organization names by the consultant. All communication and coordination in the country for collecting data should be the consultant's responsibility;
- D. Manage all the logistics of field survey in coordination with MedUp! Project Management Units;
- E. Train an adequate number of enumerators that will be recruited in cooperation with the Oxfam country team for the field survey and supervise their work (both progress and the quality);
- F. Ensure that all his / her personnel employed are following and signing the Oxfam Code of Conduct;
- G. Present and discuss the preliminary and final findings of the evaluation with PMUs, RMU and project partners;

- H. Be available to share the findings and actively participate in a workshop that will be organized in Tuscany to inform Italian actors about the achievements and learnings of the project;
- I. Submit the deliverables (mentioned under item 9 below), and,
- J. Maintain the confidentiality of all information gathered.

8. Responsibilities of OXFAM ITALIA

As the organization commissioning the evaluation, Oxfam Italia will:

- A. Provide all the relevant documentation for the evaluation's purposes;
- B. Hold the responsibility for the provision of feedback / comments for inception report, questionnaires, draft report and presentations as per the agreed time frame. Provider can suggest the time frame;
- C. Share relevant information during the evaluation with Tuscany Region;
- D. Provide the templates for reporting and financial settlements;
- E. Keep the relevant stakeholders (who are to be interviewed by provider) informed about the evaluation;
- F. Make necessary arrangements for meetings and presentation whenever required;
- G. Review the timeline of evaluation and make necessary amendments in consultation with provider, and
- H. Pay as per the agreed schedule upon the completion of minimum requirements.

9. Deliverables

The provider is liable for the following deliverables:

- A. An inception report, including details such as work plan, questionnaires, guidelines FGDs and KIIs checklist and a field survey plan. (This needs to be agreed with Oxfam Italia prior to the start of field survey);
- B. Final external evaluation report (max 30 pages, without annexes) with executive summary. This needs to be submitted according to the following procedures:
The provider will prepare a draft report and share with Oxfam Italia followed by a Power Point presentation of preliminary findings on a prior agreed date. Oxfam Italia will feedback on draft report and the provider then have to finalize the report. The final version of the report has to be validated by Oxfam Italia. Report should be comprehensive with benchmarks of all indicators set in log frame and other crosscutting issues. The provider needs to submit the electronic version (i.e. Word, Power Point, Excel and pdf);
- C. It could be requested to attend a face to face or virtual meeting to present the findings of the evaluation with all the Consortium's partners and European Union representative.

The working language for the elaboration of all deliverables is English.

The period for the assignment is 6 months starting from the date of signing the contract until the submission of final report.

10. Competency of provider

The provider should possess extensive experience (minimum 10 years) in undertaking evaluations of complex multi-country/regional development programs (special attention will be given to the experience in assessing initiatives insisting on social entrepreneurship, economic and social inclusion as well as in assessing EU funded projects) and in-depth knowledge on relevant sectors and conducting evaluations, surveys researches etc. The proposed team shall comprise personnel with extensive experience (at least seven years) in the related field. The provider should also have:

- Expertise in project cycle management and extensive knowledge of monitoring, evaluation, accountability and learning systems and data collection methods;
- Deep knowledge of the social entrepreneurship, economic and social inclusion;
- Previous experience in working with INGOs' procedures, approaches and operations;
- Acknowledged similar consultancies with recognized organizations;
- Demonstrated analytical and writing skills;
- Excellent knowledge of English (Arabic would be an asset);
- Computer skills (advanced user of Microsoft Excel or similar software; statistical software is an asset);
- Experience and knowledge of the targeted area.

11. Evaluation of proposals and selection process

The provider is required to submit a comprehensive proposal describing / articulating the work requirements outlined in this ToR. The language proficiency of the proposed personnel, especially of the field enumerators are important to indicate in the proposal.

The proposal will be evaluated against the following criteria:

(The weight for the each criteria is given in percentages)

- A. Thematic expertise (at least the Team Leader) (15%);
- B. Proposed team and their qualification and experiences (25%). With equal competences, gender-balanced teams will get a higher score;
- C. Methodology and work plan which includes approach / evaluation design, sampling methodology, data collection methodology, data analysis, work plan etc. (30%);
- D. Quality of presentation of proposal (10%).

80% of weight will be given to technical proposal and 20% of weight will be given to financial proposal. The applicant should score minimum of 40% in the technical evaluation to be eligible for financial evaluation.

The proposal and the budget should be prepared using the format provided in annex 3, in English.

(Refer Annex 3: Proposal and Budget format, for details)

12. Terms and conditions

Payments will be done based on achieved milestones and submission of invoices by the provider approved by Oxfam. All incidental expenses, equipment and materials, accommodation and travel required for the assignment are to be procured by the provider except where otherwise indicated in the consultancy agreement. The provider should follow the Oxfam's Branding policies and ensure Oxfam and donor visibility rules and guidelines are respected. The provider and his / her team in the assignment must abide by Oxfam child protection policy, code of conduct, do not harm principles and Oxfam safeguarding policies. All requirements in respect of insurance including professional indemnity, worker's compensation, public liability, superannuation and taxation, are the sole responsibility of the provider.

13. Schedule of payments

- A. 30% of total value of consultancy will be paid upon the signing of agreement and the submission of the inception report.
- B. 30% of total value of consultancy will be paid upon the submission of a satisfactory first draft report.
- C. 40% of final payment will be paid after the acceptance of final report.

14. Submission process

Interested candidates (individuals or companies) should send the comprehensive proposal describing / articulating the work requirements outlined in this ToR.

The proposal should include 2 (two) documents: a) Technical Proposal and b) Financial proposal, in Euro (refer Annex 3: Proposal and Budget format, for details). Each document should be enclosed in separate file indicating the subject.

The abovementioned documents must be sent via email to cristian.bevacqua@oxfam.it and lorenzo.paoli@oxfam.it with the email subject: **Proposal for the Final External Evaluation of MedUp!**

Deadline for the receipt of proposals by Oxfam Italy: **January 19th 2022 at 6 pm** Rome (Italy) time.

15. Indicative timetable

	Date	Time
1. Sharing the Terms of Reference with the Evaluator	December 21 st 2021	-
2. Deadline for submission of the proposal for MedUp! final external evaluation	January 19 th 2022	6.00 pm Rome time
3. Contract signature	January 30 th 2022	-
4. Implementation of the evaluation process	From February to July 2022	
5.1 Preliminary findings of the Evaluation	May 2022	
5. Ending of MedUp! final external evaluation and delivery of the output final versions	July 2022	-

Annex 3_ Evaluation questions & Tools

a) OECD-DAC CRITERIA + SCALABILITY

EVALUATION CRITERIA	EVALUATION QUESTIONS
	Outlined in the ToR and integrated by ARCO
RELEVANCE	<ul style="list-style-type: none"> • Macro-level relevance: Were the project objectives and design relevant given the political, economic, and financial context? To what extent are the objectives of the project still valid? • Relevance for Beneficiaries and local stakeholders: To what extent was the project able to identify and tackle beneficiaries' and local stakeholders' actual needs and priorities? <ul style="list-style-type: none"> → Gender focus: To what extent was the project able to identify and tackle women beneficiaries and local stakeholders' actual needs and priorities? • Selection inclusiveness: Was the beneficiaries' selection process designed in such a way to ensure appropriateness and inclusiveness for all? Was it effectively so? • Adaptability to new needs: Was the project able to adapt its design and implementation strategy to new emerging needs, in order to maintain its relevance over time? To what extent has the project been able to adapt to the changing regional environment also in light of the COVID-19 pandemic?
COHERENCE	<ul style="list-style-type: none"> • Internal coherence: Were the project theory of change, vision, and purpose validated by the activities implemented? Were the activities, outputs and outcomes of the action consistent with the overall goal and the attainment of the project objectives? <ul style="list-style-type: none"> → Gender-focus: To what extent was gender mainstreaming integrated in the project multilevel design (i.e., micro, meso and macro)? • Harmonization: To what extent did other interventions support the project? What is the consistency of the project with other actors' interventions in the same context? • Innovation potential: How innovative and strategic was the project in comparison with similar initiatives internationally? Are there any reflected good practices and does it remain relevant in the face of evolving similar concepts and approaches at the local and national level? • Macro-level coherence: Was the project in line with national and regional priorities and strategies? <ul style="list-style-type: none"> → Gender focus: To what extent did the intervention support national legislation and initiatives that aim to improve gender equality and empowerment, especially regarding social and economic aspects?
EFFECTIVENESS	<ul style="list-style-type: none"> • Global Outcomes: To what extent did MedUp! contribute to the attainment of the global outcome "to promote institutional, technical social and economic conditions in the Southern Mediterranean partner countries for the development of the social entrepreneurship sector as a driver for inclusive growth and job creation"? • Specific Outcome (OO): To what extent did MedUp! contribute to the attainment of the Specific Outcome "to increase economic inclusiveness and employment in Morocco, Tunisia, Egypt, Lebanon, Jordan and Palestine where adequate policies on social entrepreneurship are in place, public-private dialogue and exchanges of practices are promoted and high-quality services for social enterprises (SEs) are provided"? What were the direct results of the project on beneficiary institutions which can be detected in terms of their potential contribution to increase economic and social inclusion and job creation in the targeted countries? <ul style="list-style-type: none"> → Gender focus: Did the intervention achieve its objectives and expected results in ways that contribute to gender equality and empowerment? If so, how? • Intermediate Outcome 1 (iOc.1): To what extent has MedUp! Macro-Level outcome "policy makers and key private and public stakeholders at local, national and regional levels

EVALUATION CRITERIA	EVALUATION QUESTIONS
	<p>Outlined in the ToR and integrated by ARCO</p> <p>are actively engaged in improving youth and gender sensitive policies and legal frameworks on social entrepreneurship” been achieved?</p> <ul style="list-style-type: none"> • Intermediate Outcome 2 (iOc.2) : To what extent has MedUp! Meso-Level outcome “quality and accessibility of support services for SEs and coordination among social entrepreneurship support organizations are increased” been achieved? • Intermediate Outcome 3 (iOc.3) : To what extent has Micro-Level outcome “existing social enterprises expand their businesses within the targeted sectors and countries” been achieved? • Multi-level approach: To what extent has the multilevel approach (i.e. micro, meso and macro) been effective to support the social entrepreneurship in Mediterranean area? What was the added value in working on social entrepreneurship at the regional level? • Outreach: Has MedUp! reached the expected number of beneficiaries? • Outputs: To what extent have the project outputs been delivered? • Perceived quality of the support: Are the beneficiaries satisfied with the quality and delivery of services? • Unintended outcomes: Were there any unintended outcomes? • Factors explaining the achievement/non-achievement of goals: How, through what additional activities or measures, would the impact or ability to generate the expected results of the project have been increased? What were the major factors influencing the achievement or non-achievement of objectives? Why has the project produced the results that have been observed? What are the circumstance and explanatory factors that resulted from the way in which the project was developed, articulated and implemented? What were the incentives and triggers that caused the observed results? How did MedUp! partners respond to challenges? <ul style="list-style-type: none"> → Gender focus What were the major factors influencing the achievement or non-achievement of objectives with respect to women beneficiaries and local stakeholders? • Heterogeneity of results: To what extent are the achieved results heterogenous across MedUp! countries? <ul style="list-style-type: none"> → Gender focus: To what extent are the achieved results heterogenous across genders? • Effectiveness-efficiency trade-off: In case of operational adjustments to the original plan, did any efficiency-effectiveness trade-off arise?
EFFICIENCY	<ul style="list-style-type: none"> • Cost-effectiveness: What were the costs-benefits of the delivery of project activities? (Efficiency in the allocation and use of human and financial resources). <ul style="list-style-type: none"> → Gender focus: To what extent have human and financial resources been allocated to promote gender equality and empowerment? • Implementing efficiency: Were the lead and implementing partners efficient in the delivery of the activities in the project? • Timing: Were the objectives timely reached? What were the reasons for delays (if any)? • Diversity and complementarity of Partnership expertise: Was partners' expertise conformed to the project needs and objectives? <ul style="list-style-type: none"> → Gender focus: Was partners' gender expertise conformed to the project needs and objectives? • Internal governance & management functioning: Were the management and governance structure of the project fully functional to reach the project objectives? Did the internal governance guarantee inclusiveness of decision-making processes? <ul style="list-style-type: none"> → Gender focus: To what extent was gender equality operationalised in project management, decision making, and allocation of human resources within the staff?

EVALUATION CRITERIA	EVALUATION QUESTIONS
	Outlined in the ToR and integrated by ARCO
SUSTAINABILITY	<ul style="list-style-type: none">• Durability of outcomes: To what extent will the benefits of a project continue after donor funding ends? → Gender focus: Will the achievements in gender equality and empowerment persist after the conclusion of the intervention?• Factors promoting/preventing sustainability: What were the major factors that influenced the achievement or non-achievement of sustainability of the project?• Technical sustainability: How have partners' capacities for influencing social business changed? What did project partners and key stakeholders learn from the project implementation?• Social sustainability: Are the social enterprises supported by the project socially sustainable?• Economic/financial sustainability: To what extent have the economic and financial dimensions of sustainability been fostered by the project?• Institutional sustainability: To what extent has the institutional dimension of sustainability been fostered by the project?• Measures to ensure sustainability: Which kind of measures were foreseen and put in place to ensure the future sustainability of the project? Are they likely to be effective? Should they have been complemented with additional actions? → Gender focus: Were mechanisms set up to support the achievement of gender equality and empowerment in the longer term?• Key actors' ownership and appropriation: Who are the key actors/stakeholders that could ensure the sustainability of the project outcomes in the long run? What is their level of ownership regarding the project outcomes?
IMPACT	<ul style="list-style-type: none">• Higher-level effects: To what extent has the project generated intended and unintended higher-level effects at the micro, meso, macro and regional levels? → Gender focus: To what extent has the intervention contributed to build an inclusive and equitable environment by addressing systemic issues causing gender inequalities, especially for what concerns women entrepreneurship? → Gender focus: To what extent have impacts contributed to equal power relations between people of different genders and to the change of social norms and systems?• Impact mediating factors: What are the factors that may positively/negatively determine a positive impact in the long run?
SCALABILITY	<ul style="list-style-type: none">• Scalability potentials: Is there evidence that the project is likely to grow – scaling up and out – beyond the project life? Which are the possible scalable elements? What would be the relevant area and beneficiaries?• Practical requirements for scalability: Who could be the potential partners for such scalability? What would be the magnitude of funds to make scalability or replication possible?• Favourable Conditions: What are the essential conditions/factors that should be present for the project to scale up?• Potential obstacles: What kind of obstacles/ negative factors may hinder the project scalability?
SWOT	<ul style="list-style-type: none">• SWOT: Which were the main Strengths, Weaknesses, Opportunities and Threats of MedUp! project?

EVALUATION CRITERIA	EVALUATION QUESTIONS
LEARNING AND CAPITALIZATION	Outlined in the ToR and integrated by ARCO
	<ul style="list-style-type: none"> • L&C : What did project partners and key stakeholders (i.e. SESOs, social enterprises, national and subnational governments, partners, and project/regional management units) learn from the project implementation especially in terms of access to finance for social entrepreneurs? How can these learnings be capitalized in future projects? <ul style="list-style-type: none"> → Gender focus: What did project partners and key stakeholders (i.e. SESOs, social enterprises, national and subnational governments, partners, and project/regional management units) learn from the project implementation especially in terms of contributing to gender equality and empowerment? How can these learnings be capitalized in future projects? • Linkages to Trait d'Union: Which kind of lessons learnt can benefit the Trait d'Union project?

b) SUBGRANTING & ACCESS TO FINANCE COMPONENT		ANALYTICAL LENSES								
			OECD-DAC CRITERIA +						THEORY OF CHANGE	
EVALUATION QUESTIONS	STEP OF THE PROCESS	RELEVANCE	EFFECTIVENESS	EFFICIENCY	SUSTAINABILITY	COHERENCE	SCALABILITY	IMPACT	COMPONENT IN THE RE-SULT CHAIN	IMPLEMENTERS' POWER TO INFLUENCE
SUBGRANTING	How was the subgranting system designed? What are the key aspects and mechanisms related to its functioning?								Inputs Activities	Sphere of action
	Which were the eligibility and selection criteria ? Why were those criteria chosen?								Activities	
	Was the overall system designed in such a way to ensure inclusiveness and accessibility , especially for marginalized groups?									
	What level of commitment was required to the applicants? (e.g., in terms of co-funding, time, effort, ...)								Activities	
	Was the subgranting system designed in such a way to be easily adaptable to SEs needs ? (disbursement timing, the volume of instalments, etc.)								Inputs Activities	
	Was the governance and management structure designed in such a way to ensure the efficiency of the overall system?								Activities	
	Were the implementing Partners endowed with the needed skills and knowledge to effectively design and implement the subgranting? Were there any skill gaps detected? If yes, were they properly tackle throughout the project?								Inputs Activities Outputs	
	Was the subgranting implemented in a cost-effective way ? Were overall costs for the design and implementation of the subgranting (especially in terms of HR effort) well-balanced and convenient with respect to the actual disbursement rate?								Inputs Activities Outputs	
	To what extent was the subgranting system designed in <i>MedUp!</i> similar or different with respect to other subgranting initiatives implemented in the partner countries?								Inputs Activities Outputs	
	Which were the main characteristics of the SEs applying to the grant?								--	Sphere of action/control
	Why did they apply?								--	Sphere of action/control
	How many SEs applying to the grant were assessed as "non-eligible"? Which were the main reasons for their non-eligibility? How many applicants could have been considered eligible, but were not provided with the grant because of funding limitations ?								Inputs Activities Outputs	Sphere of action

b) SUBGRANTING & ACCESS TO FINANCE COMPONENT		ANALYTICAL LENSES								
			OECD-DAC CRITERIA +							THEORY OF CHANGE
EVALUATION QUESTIONS	STEP OF THE PROCESS	RELEVANCE	EFFECTIVENESS	EFFICIENCY	SUSTAINABILITY	COHERENCE	SCALABILITY	IMPACT	COMPONENT IN THE RESULT CHAIN	IMPLEMENTERS' POWER TO INFLUENCE
Have the subgrants offset these alternative financing opportunities ?									Outputs, Outcomes (short term)	Sphere of control
In general, did SEs receive the funding amount they originally requested ?	DISBURSEMENT								Outputs	Sphere of action
How long did it take from the application deadline to the disbursement of the grant? Did the pandemic situation negatively influence the timing?									Activities Outputs	Sphere of action // control
Were some follow-ups carried out after the disbursement of the funds? If yes, how many and how frequently? Was the actual use of the funds monitored ?									Activities Outputs Outcomes (short term)	Sphere of action // control
Was the amount of the disbursed grants adequate to strengthen the SEs ?									Inputs-out-puts-out-comes (short term)	Sphere of action // control
How were the funds used? Were the funds used to cover current expenditures or to undertake new investments? Was their actual use influenced by the effects of the pandemic situation ?	USE								Outputs Outcomes (short term)	Sphere of control
How did the funds usage and effects vary among SEs ? Was there any correlation between the use of the funds and the characteristics of the SEs (for instance SEs maturity)?									Outputs Outcomes (short term)	Sphere of control
To what extent were the purchases and investments undertaken thanks to the grants important for SEs ? Would the SEs have looked for funds to make those purchases/investments anyway, even in the absence of MedUp! opportunity?									Outcomes (short and medium term)	Sphere of influence
Are the purchases/investments undertaken thanks to the grant likely to produce benefits in the medium-long run for the SEs (by increasing their business profitability, social impact, or sustainability)?									Outcomes (medium-long term)	Sphere of Influence
To what extent is the subgranting system scalable ? Under which conditions? Are some adjustments needed to ensure its scalability?	CROSS-CUTTING								Cross-cutting	Cross-cutting
AC-What kind of financing mechanisms are available for SEs in the different MedUp!										

b) SUBGRANTING & ACCESS TO FI- NANCE COMPONENT		ANALYTICAL LENSES									
			OECD-DAC CRITERIA +							THEORY OF CHANGE	
EVALUATION QUESTIONS		STEP OF THE PROCESS	RELEVANCE	EFFECTIVENESS	EFFICIENCY	SUSTAINABILITY	COHERENCE	SCALABILITY	IMPACT	COMPONENT IN THE RE- SULT CHAIN	IMPLEMENTERS' POWER TO INFLUENCE
	Countries? Are the financing products specif- ically targeting SEs?										
	What are the key factors positively/negatively influencing SEs' access to finance in the dif- ferent MedUp! Countries ?										
	Was MedUp! support beneficial to open up new opportunities for SEs, to enhance their confidence in managing financial products and in seeking and securing alternative fi- nancial sources?										
	What are the PROs and CONs of grants compared with other financing mechanisms?										
	Which alternative financing mechanisms for SEs could/should be promoted?										

Annex 4_ Evaluation respondents

RESPONDENT		DATA COLLECTION TOOL	PROJECT STAKEHOLDER	ROLE	DATE
Ahmed	Ben Nejma	Semi-structured interview	PMU representative	Project Officer - Oxfam Tunisia	04.04.22
Amr	Elabbasy	Semi-structured interview	Policymaker	Manager of Investment and Venture Capital Department - MSMEDA	17.04.22
Asma	Mansour	Semi-structured interview SFGD	PMU representative	CEO & Co founder - TCSE	04.04.22 30.05.22
Asmae	Diani	Semi-structured interview	Project local stakeholder - Academic researcher	Vice President - REMESS	25.04.22
Christian	Vietz	Semi-structured interview	Technical Partner	Policy and Project Officer - Euclid Network	12.04.22
Cristian	Bevacqua	Semi-structured interview	Regional Platform	<i>Regional Project Coordinator - Oxfam IT</i>	08.04.22
Davide Costa		Semi-structured interview	PMU representative	MedUp project officer - Oxfam Jordan	13.04.22
Dorotea	Daniele	Semi-structured interview	Technical Partner	Project Officer - Diesis Network	05.04.22
Eric	Asmar	Semi-structured interview	Beneficiary SESO	CEO - Happy Smala	24.05.22
Firas	Zayater	Semi-structured interview SFGD	Regional Project Coordinator	Project Coordinator - Oxfam Lebanon	06.04.22
Fouad	Kharma	Semi-structured interview	Project local stakeholder - Financial institution/Policy-level actor	Programs Department Director - Cooperative Work Authority (CWA)	06.06.22
Giuseppe	Matarazzo	Semi-structured interview	Finance Manager	Finance Manager - Oxfam IT	08.04.22
Hadeel	Qazzaz	Semi-structured interview	Gender Regional Expert	Gender Regional Expert – Oxfam International	30.03.22
Hala	Nassif	Semi-structured interview	Project consultant - SE coach	Director - The Rural Initiatives	24.05.22

Hiba	El Khamal	Semi-structured interview	PMU representative	Program Manager - Economic & Environmental Justice- Oxfam Morocco	14.04.22
Huthayfa	Assi	Semi-structured interview	Former PMU representative	Former Project Coordinator – PARC Palestine	14.04.22
Ibrahim	Fathy Zalot	SFGD	PMU representative	Social Business Incubation Officer - SEKEM	30.05.22
Jamil	Khatib	Semi-structured interview	Project consultant - SE coach	Director - IBTECAR	08.04.22
Lama	Amr	Semi-structured interview	Beneficiary SE/SESO	Executive Director - BuildPalestine	16.04.22
Lara	Macaron	Semi-structured interview	Project consultant - gender expert	Director - Vision	26.05.22
Latifa	Ghazel	Semi-structured interview	Beneficiary SE	Founder - Sciencia	22.04.22
Laurens	Coeveld	Semi-structured interview	Technical Advisor	Project Leader Access to Finance - Oxfam Novib	01.04.22
Lorenzo	Paoli	Semi-structured interview SFGD	Technical Advisor	MEAL Advisor – Oxfam IT	05.04.22 30.05.22
Lotfi	Ben Aissa	Semi-structured interview	Project local stakeholder - Policy level actor	Tunis Municipal Councilor	15.06.22
Mahdi	Caf	Semi-structured interview	PMU representative	Project Officer - Enactus	14.04.22
Mahmoud	Qafaf	Semi-structured interview SFGD	PMU representative	Oxfam Palestine	11.04.22 30.05.22
Margreet	Magdy	Semi-structured interview	PMU representative	Director of Business Incubator - SEKEM Development Foundation	20.04.22
Marina	Sarli	Semi-structured interview	Technical Partner	EU Programs Lead - Impact Hub	12.04.22
Meryem	Kebbaj	Semi-structured interview	Project consultant - Academic researcher	Academic researcher - Hassan II University	26.04.22
Mohannad	Ibrahim	SFGD	PMU representative	Economic Justice Programme Business Development Analyst - Oxfam Jordan	30.05.22
Nawras	Ateeq	Semi-structured interview SFGD	PMU representative	Project Officer - PARC	11.04.22 30.05.22

Nehal	Ali	Semi-structured interview	PMU representative	Project Officer - Oxfam NAF	20.05.22
Randa	Abed Rabbo	Semi-structured interview	Project local stakeholder - Financial institution	Union Director - UCASC (Union of Cooperative Associations for Savings and Credit)	26.04.22
Salam	Yousef	Semi-structured interview	PMU representative	Project Coordinator - JOHUD	13.04.22
Salma	Elsayeh	Semi-structured interview	Beneficiary SESO	Deputy Manager - Ahead of The Curve	24.05.22
Samuel	Barco	Semi-structured interview	Technical Partner	Consultant - Diesis Network	05.04.22
Sergio	Garcia	Semi-structured interview	Regional Platform	Programme Manager - Oxfam International	05.04.22
Shaimaa	Helal	Semi-structured interview	Policymaker	Project Director - Academy of Scientific Research and Technology	29.04.22
Sherwet	Ahmed	Semi-structured interview	PMU representative	Program Coordinator - Oxfam NAF	20.05.22
Silvana	Grispino	Semi-structured interview	Technical Advisor	Economic Justice Advisor - Oxfam IT	13.04.22
Tarek	Matar	Semi-structured interview	Beneficiary SESO	Programs Director - Neopreneur	19.04.22
Virginie	Cossoul	Semi-structured interview	Donor representative	Senior Project Manager - European Commission	20.04.22

Annex 5_ Logical Framework

				OVERALL targets		EGYPT		JORDAN		LEBANON		MOROCCO		PALESTINE		TUNISIA	
Results chain	Indicators		Baseline	Targets 2022 by LF approved	Total	Country Target	Progress (July 2022)	Country Target	Progress (July 2022)	Country Target	Progress (July 2022)	Country Target	Progress (July 2022)	Country Target	Progress (July 2022)	Country Target	Progress (July 2022)
Overall objective (OO)	001	No. of jobs created (disaggregated by gender, age and rural/urban location)	0	300	1357	30	529	50	85	30	145	50	171	35	394	19	33
	002	No. / % of SEs that have increased their revenues/turn over and/or number of employees (disaggregated by location urban/rural, leadership w/m, employees w/m)	0	70% of SEs supported	44	70%	8	70%	8	70%	It will be reported on August 2022	70%	7	70%	13	70%	8
	003	No. / % of women social entrepreneurs in targeted firms	88 women	20% increase of number of women social entrepreneurs	120	20%	21	20%	12	20%	4	20%	6	20%	71	20%	6
Outcome (OC)	OC1	No. / % of social enterprises (SEs) in targeted countries reporting that the institutional, technical, social, and economic conditions have improved	TBD in mapping at baseline	70% of targeted SEs report improved conditions	45	70%	8	70%	11	70%	It will be reported on August 2022	70%	6	70%	13	70%	7
	OC2	No. of young people and women who engage in activities (debates/training/projects etc.) related to social entrepreneurship	0	650	8950	100	4426	110	314	100	51	100	128	110	630	290	3401
Macro Level Intermediate Outcome (iOC1)	iOC1.1	No. / % of new and/or improved regulations and initiatives advocated/supported/ in place that promote women and youth social entrepreneurship in targeted countries	TBD in mapping at baseline	At least 2 regulations per targeted country are advocated/supported/ in place	13	0	5	2	1	2	1	1	1	2	2	2	3
Meso Level Intermediate Outcome (iOC2)	iOC2.1	No. of targeted social entrepreneurship support organizations (SESOs) that adopt tailored tools to assist SEs in developing their business	TBD in mapping at baseline	60	48	10	12	10	8	8	3	15	6	10	5	10	14
	iOC2.2	No. of new formal partnerships between SESOs and local or international financial institutions/social investors	N/A	8 new partnerships: - At least 1 new formal partnership among SESOs are available per each targeted country - At least 2 regional partnerships among SESOs exist	9	1	4	1	It will be reported on August 2022	1	It will be reported on August 2022	1	2	1	1	1	2
	iOC2.3	N. of SEs provided with tailored services by SESOs (disaggregated for type of service)	0	35	62	6	8	6	11	4	10	15	12	5	16	13	5
Micro Level Intermediate Outcome (iOC3)	iOC3.1	No. of SEs that have started new activities, launched additional investments, added innovative processes and/or tools with the project support	N/A	At least 4 per country	46	3	8	4	11	4	8	4	7	3	4	13	8
	iOC3.2	Average number of linkages established by targeted SEs with other actors in the business sector in targeted countries	N/A	At least 5 linkages per country	51	3	4	5	13	5	11	5	10	3	2	5	11

Op 1.1 (linked to iOC1)	Op 1.1.1	No. Of up-to-date study of actors and regulations is available in each of the 6 countries	N/A	1 national study per targeted country is available	11	1	1	1	1	1	1	1	1	1	2	1	5
	Op 1.1.2	Up-to-date regional inventory of key public and private actors in the field of SE available	N/A	1 regional inventory is available	1	-	-	-	-	-	-	-	-	-	-	-	-
Op 1.2 (linked to iOC1)	Op 1.2.1	No. of public-private dialogues and meetings on SE organized	0	25-27	23	3	6	4	1	4	3	3	7	6	1	4	3
	Op 1.2.2	No. of advocacy and influencing actions for strengthening regulatory frameworks carried out	0	14	12	1	4	3	2	3	It will be reported on August 2022	1	4	2	It will be reported on August 2022	3	2
Op. 1.3 (linked to iOC1)	Op 1.3.1	No. Of up-to-date analysis of barriers existing in the region to women access to economic activities and recommendations for action are available	0	1 analysis is available	1 (regional output)	-	-	-	-	-	-	-	-	-	-	-	-
Op 2.1 (linked to iOC2)	Op 2.1.1	No. of SESOs trained on capacities building activities and innovative technical tools	0	60	139	10	26	10	21	12	20	15	16	10	19	10	37
Op 2.2 (linked to iOC2)	Op 2.2.1	No. of SESOs representatives participating in peer to peer learning and networking activities (including organizations from Europe)	0	60	10	10	4	10	It will be reported on August 2022	10	2	15	2	10	It will be reported on August 2022	2	2
Op 3.1 (linked to iOC3)	Op 3.1.1	No. of SEs having received financial and technical support to their business plan (disaggregated by level, location, leadership gender)	0	100	66	13	8	20	11	10	10	15	12	20	16	13	9
	Op 3.1.2	No. of people from targeted SEs trained in financial and technical tools for SEs (disaggregated by age, gender and location rural/urban)	0	100	126	13	20	20	It will be reported on August 2022	20	It will be reported on August 2022	15	10	20	71	10	25
Op 3.2 (linked to iOC3)	Op 3.2.1	No. of success stories identified and disseminated	0	24	25	3	9	4	10	4	It will be reported on August 2022	4	It will be reported on August 2022	1	6	5	It will be reported on August 2022
	Op 3.2.2	No. of public events to disseminate best practices among national, regional and international audiences	0	18	5	1	5	3	It will be reported on August 2022	2	It will be reported on August 2022	1	It will be reported on August 2022	2	It will be reported on August 2022	3	It will be reported on August 2022
	Op 3.2.3	No. of regional initiatives (platforms, social media, etc.) used to disseminate best practices	0	1-6	8	0	1	0	It will be reported on August 2022	0	It will be reported on August 2022	0	It will be reported on August 2022	0	7	2	It will be reported on August 2022

Annex 6_ ARCO & the Evaluation Team

ARCO

ARCO is a research centre founded in 2008 at *PIN S.c.r.l. Servizi didattici e scientifici per l'Università di Firenze*. The centre's experts have excellent knowledge and proficiency in social impact assessment, impact evaluation, social enterprise development and assessment. ARCO researchers are organized in five strategic unit: Social Economy, Impact Evaluation, Local Development, Inclusive development and Circular Innovation and Sustainable Commodities. ARCO's mission is to offer scientific and strategic support to organizations engaged in projects with positive social impact.

In particular, the present study was jointly carried out by the **Social Economy Unit**, having an extensive understanding in research, implementation and evaluation of enabling eco-systems for social enterprises, the **Impact Evaluation Unit** having a broad experience in evaluating development project/programs worldwide, and the **Inclusive Development Unit**, widely proficient in gender-sensitive impact evaluations.

Evaluation team

The research team was composed by **7 researchers** and an **Arabic-speaking consultant**.

The scientific coordination for the Final Evaluation was Dr. **Enrico Testi**, ARCO's Executive Director.

Camilla Guasti and **Vittoria Vineis** (researchers at the Social Economy Unit) carried out the evaluation activities and analysis.

Marta Russo, M&E Unit Coordinator, was in charge of the technical supervision of the tools used for the data collection, the data collection process as well as the data cleaning and analysis that was carried out by **Tommaso Iannelli** (data analyst).

Two senior researchers were the scientific advisors respectively on Social Entrepreneurship (Dr. **Marco Bellucci**) and women and youth inclusion (Dr. **Caterina Arciprete**).

For more information on the Evaluation Team see the table below.

NAME	SHORT BIO	ROLE IN THE EVALUATION
Enrico Testi (Ph.D)	Enrico is the executive director of ARCO since 2009. He is a specialist in social enterprise, social innovation and evaluation of programs on these topics. His Ph.D. thesis was focused on enabling eco-system for social enterprises.	Scientific coordinator
Vittoria Vineis	Vittoria is a researcher in the Social Economy Unit of ARCO. She has a specific background on international cooperation, having mainly worked with NGOs in the past few years. She has recently carried out a political economy field research on "Enabling Social Enterprise Ecosystem" in Palestine, in cooperation with the Yunus Social Business Centre of Bethlehem.	Social Economy Researcher
Camilla Guasti	Camilla is a researcher in ARCO's Social Economy Unit. Her field of expertise is social economy, social business design, participatory methods and social innovation.	Social Economy Researcher

	Her master thesis was on the creation of an evaluation framework for social innovation and social economy.	
Marco Bellucci (Ph.D.)	Marco is Assistant Professor in Accounting at the University of Florence and teaches Planning and Control. His research interests include social and environmental accounting, stakeholder engagement, social entrepreneurship, and non-profit organizations.	Social Economy Senior researcher
Marta Russo	Marta is the coordinator of the research unit on M&E and Impact evaluation. She is responsible for the Monitoring and Evaluation process of development projects. Her main research interests include evaluation methodologies, education, vocational training, and youth employment.	M&E expert
Caterina Arciprete (Ph.D)	Caterina is a senior researcher in ARCO's inclusive development unit. She holds a Ph.D in Development Economics from the University of Florence and was a visiting scholar at Oxford University. Her field of expertise is the assessment of inclusiveness of policies and projects with a gender-sensitive lens.	Gender expert
Tommaso Iannelli	Tommaso is M&E officer in ARCO's M&E and Impact evaluation Unit. His field of expertise is the Monitoring and Evaluation process of development projects and data management and analysis. His main areas of interest are youth employment and microcredit.	Data analyst
	An Arab-speaking consultant hired by ARCO will support the team in the data collection activities.	Arabic speaking consultant

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