



Report

Orange Corners and OCIF outcome evaluation

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Table of contents

Management summary	4
1 Introduction.....	10
1.1 Cause and context evaluation.....	10
1.2 Research objectives and research questions.....	10
1.3 Research design	11
1.4 Reading guide	13
2 Background.....	15
2.1 Policy context.....	15
2.2 Description of the programme	17
2.3 Distinguishing features of the programme.....	22
2.4 Insights from previous evaluations.....	23
3 Outreach	26
3.1 Location	26
3.2 Sector	27
3.3 Business stage	28
3.4 Political context	29
3.5 Gender.....	30
3.6 Other dimensions.....	31
4 Personal development.....	32
4.1 Skills and knowledge acquired	32
4.2 Income created	37
4.3 Unintended effects	38
5 Business development	41
5.1 Business survival	41
5.2 Business stage of surviving businesses	43
5.3 Economic development of businesses	47
5.4 Effect of OCIF on the effectiveness of Orange Corners training	52
5.5 Economic effects of Orange Corners/OCIF business.....	53
6 Entrepreneurial ecosystem and role of implementing organisations .	57
6.1 Portfolio.....	57
6.2 Follow-up survey	59
6.3 Interviews	61
6.4 Case studies	61
7 Key takeaways from this evaluation	64
7.1 Introduction	64
7.2 Outreach	64
7.3 Personal development	65
7.4 Business development.....	66
7.5 Entrepreneurial ecosystem.....	67
8 Improvement & recommendations.....	69
8.1 Introduction	69
8.2 Possible improvements of Orange Corners and OCIF instruments.....	69

8.3	Practical recommendations for a roadmap.....	72
8.4	Practical recommendations for future evaluation.....	75
Appendix 1.	Detailed research questions & research design.....	77
Appendix 2.	RVO quarterly report and RVO Programma survey data	
82		
Appendix 3.	Additional tables and figures chapter 3 and 5.....	92
Appendix 4.	Overview interview respondents.....	99
Appendix 5.	Survey	105
Appendix 6.	Case study selection	108

Management summary

Orange Corner incubation and acceleration programmes

The Orange Corners programme is an initiative by the Dutch Ministry of Foreign Affairs, executed and managed by the Netherlands Enterprise Agency (RVO). It is an entrepreneurship support programme in countries in Africa, the Middle East and Asia that support these young entrepreneurs (aged 18-35 years) to turn their innovative ideas into successful start-ups. Incubation and acceleration programmes that give young entrepreneurs access to training, networks and facilities to launch or scale their business are central. Local implementing organisations can apply for a grant to develop (in a four or five-year period) incubator and accelerator training programmes. After a few years of piloting and developing Orange Corners, the subsidy programme Orange Corners 2024-2028 was announced in 2023. A total budget of €12 million was available for the first two subsidy rounds in 2023. A local implementing partner can apply for a subsidy of up to 75% of the total project costs, up to a maximum of €750.000. A third subsidy round was announced in March 2024 and was specifically aimed at the target locations of the Palestinian Territories and Senegal (with a maximum of up to €600.000 in each target location). Only one subsidy can be provided per target location, and the project runs for four or five years.

Orange Corners Innovation Fund (OCIF)

OCIF supplements the incubator and accelerator programmes by providing flexible financing at an early stage to foster business growth and increase employment. OCIF consists of two tracks: In OCIF Track I, the fund can provide a maximum of €5000 to an entrepreneur enrolled in the OC incubation and acceleration programme. This €5000 includes part monthly allowance and part prototype voucher. Entrepreneurs who have successfully completed this programme are eligible to receive OCIF Track II funding which consists of a maximum of €50.000 (part loan and part subsidy) per business. From 2019-2021, OCIF was piloted in 5 countries. In the period 2021-2025 it was a full-fledged subsidy program, open to 9 target locations (Ghana, Iraq-Baghdad, Iraq-Erbil, Ivory Coast, Morocco, Mozambique, Nigeria, Senegal and Sudan). The total budget was €12.6 million and local fund managers could apply for a subsidy of up to €1.4 million per target location. A positive OCIF impact evaluation formed the basis for the decision to make OCIF available in all OC programme countries (with a running training programme). Subsequently, with the Orange Corners subsidy programme, the OCIF 2024-2030 programme was also announced. This programme is available for all Orange Corners hubs and Tunisia and has a total budget of €46.2 million. Per target location a subsidy of up to €2.2 million is available. Subsidies are awarded for no more than 95% of the eligible costs.

Distinguishing features of the OC (incubation/acceleration) & OCIF programmes

Orange Corners has – compared to other programmes aimed at supporting youth entrepreneurship – a distinctive integral approach, combining training and funding, particularly at pre-commercial stages. The program adopts an ecosystem approach, analysing local contexts to adapt programs accordingly, ensuring adaptability. Orange Corners works with local implementing partners, fostering institutional development and embedding the program in local ecosystems without requiring new infrastructure. It also invests in capacity building of these partners for sustainability beyond Dutch government support. A particular feature – next to its distinctive branding – is its close association with Dutch embassies. Orange Corners hubs are only started on the initiative of the embassy, and with close involvement of the local embassy afterwards. This also provides opportunities for strengthening diplomatic relations and enhance visibility and opportunities on a political level, and to reinforce ties

between the hub country and the Netherlands. Therefore, Orange Corners and OCIF often represent flagship programmes for the local embassies.

Focus of this outcome evaluation

This evaluation is focused on understanding the main medium-term effects (i.e. three years after the treatment) of the Orange Corners programme and OCIF on its beneficiaries (young entrepreneurs who have participated in these programmes) and their businesses. This evaluation focuses on programme participants (alumni) from the year 2021. The evaluation analysed five central themes: 1) the outreach and variety in effect of the programmes; 2) the impact of OC and OCIF on the personal development of participants; 3) the impact of OC and OCIF on the development of the businesses of the participants; 4) the wider challenges of the entrepreneurial ecosystems where the programmes are active and the role of the implementing organisations, and 5) improvements and recommendations for the programmes. This outcome evaluation focuses strongly on programme participants (alumni) from the year 2021. It is important to acknowledge that the programme has undergone significant development since that time. Key changes include the expansion of the OCIF, a gradual shift from supporting ideation-stage entrepreneurs to more mature ventures, efforts to strengthen the use of alumni-networks and the transition to a subsidy framework under Orange Corners Incubation and Acceleration Component (OCIAC). As a result, some of the recommendations from this report are already (partially) adopted by the programme management.

Research approach

Our evaluation uses a mixed-method approach combining five research methods: desk research, interviews, portfolio analyses, surveys, and case studies. The process began by desk research to analyze existing documentation from Orange Corners and OCIF progress reports, cohort reports, annual reports, delivery plans, and policy documents to better understand the policy context of both programs. We compiled available information derived from quarterly reports and a Programme survey, both performed by RVO and analyzed these in an excel database. In parallel we performed introductory interviews with policymakers and well as OC and OCIF policy implementors in both the Netherlands and in the five case study countries selected (Morocco, Egypt, Nigeria, the Kurdistan region in Iraq and Senegal). We designed and ran a follow-up survey specifically designed for this evaluation. All Orange Corners cohorts from 2021 were included. To increase the response rate, the survey was made available in the following languages: Arabic, English, French, Kurdish, and Portuguese. The survey was sent to 508 Orange Corners/OCIF alumni, of which 159 completed the survey (a response rate of 32%). Additionally, we conducted in-depth case studies of five hubs indicated above to gain a deeper understanding of how Orange Corners/OCIF interventions affected and were affected by local contexts. Through interviews with entrepreneurs (i.e. OC and OCIF alumni), implementing partners, and roundtables with stakeholders from the regional entrepreneurial ecosystem in three out of the five hubs (as part of the field visits in Morocco, Egypt and Nigeria). In total 101 persons were interviewed. The methods combined resulted into a rich picture of the program's activities and (perceived) impacts, on the personal development of participants, their businesses, and the entrepreneurial ecosystems at large. The research for this evaluation was performed over the period June 2024-March 2025. Below we highlight the main results.

Outreach

The Orange Corners (OC) program effectively reaches young entrepreneurs in stable and fragile states in Africa, the Middle East and Asia. In 2021 the program operated in low and middle-income countries, including fragile such as Iraq, Sudan, and the Democratic Republic

of Congo, with hubs in North Africa, Sub-Saharan Africa, and the Middle East. A total of 5,111 entrepreneurs applied for the 2021 cohorts of OC, with 294 participants selected (6%), indicating a highly competitive selection process. The average age of participants when entering the program was 28 years. The selection was most stringent in fragile regions due to a higher number of applicants. This discrepancy could either indicate active outreach efforts targeting potential entrepreneurs in these areas or a larger group of aspiring entrepreneurs lacking alternative support networks in these regions. Participating businesses were active in a diversity of sectors, with agriculture being the largest (21%), followed by internet and communication technology (12%), health and safety (9%), education (9%), food, drinks, and entertainment (8%), engineering (6%), professional business services (6%), and energy (5%). Most of the businesses enrolled in the OC program without having a product on the market (60%). A few had introduced a product on the market (5%), 22% had paying customers, while 15% were already making a profit. So, the majority was in the idea phase, but a large group can be characterized as businesses already. The gender distribution among participants was not balanced, with 38% of the applicants being female (and 45% of the selected entrepreneurs). This disparity reflects the challenges faced by women in accessing entrepreneurial opportunities in some of these fragile states.

Personal development

The Orange Corners program has received positive feedback from its participants (i.e. the participants from 2021), who appreciate its unique blend of training, mentorship, networking, and support. The skills acquired through the program have been particularly valuable for young entrepreneurs with limited business experience. Three key skills that stand out are 'using one's imagination and abilities to identify opportunities for creating value', 'believing in oneself and continuous development', and 'making decisions while dealing with uncertainty, ambiguity, and risk'. These skills have not only helped participants achieve their goals but also fostered entrepreneurship skills such as imagination, opportunity recognition, decision-making, and financial literacy. Participants were primarily motivated by the desire to acquire knowledge, develop skills, and receive mentorship and guidance. However, many also emphasized the importance of accessing funding, which was crucial for launching or growing their businesses in an environment with limited financing options.

The program has had a positive impact on participants' income generation, with two distinct groups emerging: those whose current business is not their main source of income and those whose business is their primary income source. For most Orange Corners-only participants¹ their business is not their main source of income, while for the majority of OCIF participants the business is their main source of income. Furthermore, the program has led to several secondary positive effects, including the development of follow-on businesses (almost two thirds of the participants - 63% for OC and 66% for OCIF founded additional successful businesses!), networking, and entrepreneurial communities. A large group of alumni keeps in touch with the people they met through Orange Corners. Many participants value these connections and have even begun paying it forward by mentoring or training aspiring entrepreneurs in their region.

Business development

The business participating in Orange Corners (in 2021) have demonstrated a relatively high survival rate, with 81% of participating businesses surviving the first three years after the

¹ This subgroup participated only in training and did not receive any form of funding. This was still possible in 2021, but since OCIF is now available in all programme countries this category no longer exists.

program's conclusion. This survival rate surpasses the global average of 60-70%. For participants backed by OCIF, this business survival rate after three years is even over 90%.² Most of the 2021 alumni interviewed reported that the support from Orange Corners significantly enhanced their business development, citing improvements in strategy, finance, marketing, operations, and overall business models. Financially, participating businesses have experienced varying degrees of success. While many are not yet profitable or have only one paying customer after three years, there is substantial progress compared to the start of the program. Over time, we see a steady increase of the turnover of businesses of Orange Corners (year 2021) alumni. More importantly, we also see profit rates of the businesses increasing.

Comparing Orange Corners-only participants with those who received OCIF (Track I) support, the latter group showed more significant progress. Approximately 60% of OCIF Track II participants developed products for multiple customer segments, while only 33% of Orange Corners-only participants achieved this milestone. This suggests that OCIF Track II has a substantial impact on business growth and development in countries where Orange Corners operates. It seems that – again based on analyses of the 2021 cohort - business with OCIF (compared to Orange Corners only) have (1) a higher survival rate (2) are in further phases of product and customer development (3) have much higher revenues.

Regarding financial viability of the 2021 cohort of entrepreneurs (that responded to our survey) we conclude that most of the businesses are not yet financially viable after three years. They do not have multiple paying customers and are not yet profitable. This means that many of the businesses have not yet taken off, even after three years. The entrepreneurs of these unprofitable businesses get their income from other businesses or occupations. This is also reflected in the income generation data that show that for most Orange Corners participants without OCIF, their business is not their main source of income.

The number of full-time jobs Orange Corners and OCIF alumni from 2021 (as reported by the 118 respondents in the Dialogic survey) have created has grown from over 200 in 2020 to 700 full time jobs in 2024. Over 50% of these jobs are conducted by women. The impact of the total population of not only all entrepreneurs participating in 2021, but also from entrepreneurs that participated in earlier or later years in the OC and OCIF programmes is evidently larger but cannot be assessed based on the datasets available.

Wider entrepreneurial ecosystems and role of implementing organisations

The entrepreneurs participating in this study face significant challenges, particularly in accessing finance (70%), markets (63%), and suitable human capital (57%). When starting a business, they perceive access to financing opportunities, international networks, customers, and mentors/advisors as major hurdles. The Orange Corners program has proven most effective in addressing the "access to mentors/advisors" challenge, but it seems to have less impact on market access and international networking. The effectiveness of the Orange Corners program varies across different entrepreneurial ecosystems, with higher additionality observed in regions with limited entrepreneurship support. In peripheral regions of Morocco and Egypt, where traditional support infrastructure is scarce, the Orange Corners program seems to have a more substantial impact, than in the capital regions of these countries. The program's success also depends on the quality of local implementing partners. Regions with high-quality partners have seen better results, while those with weak organizations or staff dynamics have struggled to deliver effective services. In some cases, partner changes (e.g.,

² Results are most likely somewhat positively biased as more successful participants are more likely to respond (selection effect).

in Iraq and Senegal) or further development of services by long-standing partners like in Nigeria and Egypt have enhanced the program's impact. Most respondents participating in OC and/or OCIF (62%) have a positive sentiment regarding implementing organisations and gave positive remarks, especially about access to mentors and advisors. However, more detailed critical remarks about the implementation were made as well. The Dutch embassies play a crucial role in connecting local Orange Corners programs with Dutch firms and the broader international community, contributing to the success of the initiative.

Improvements and recommendations for the programmes

Both Orange Corners and OCIF are examples of policy programmes that are very much policy-in-action programmes. Policy learning is taking place along the execution of both programmes. Programme management is open to adapt the programme and its execution if needed and this is also reflected in an eagerness to invest in monitoring, evaluation and learning. However, there are still policy design dimensions where in our view a clearer choice can be made in the years to come. We present them here as choices including our recommendation:

- A. **Position Orange Corners and OCIF as a broad programme supporting entrepreneurship or as programme that primarily focuses on scalable innovative startups?** We recommend to clearly articulate whether Orange Corners and OCIF is focusing on broadly supporting entrepreneurship among young people or on a much smaller subset of scalable innovative startups. A focus on the latter would require a major redesign of the programmes and we doubt whether especially in the very fragile environments it would be realistic and feasible to do so.
- B. **Coupling of Orange Corners and OCIF?** There is a clear logic of coupling the two and therefore recommend keeping the Orange Corners (incubation and acceleration programmes) and OCIF as one package. This also implies that organisations that implement Orange Corners and OCIF – in most cases separate identities – need to coordinate. Orange Corners and OCIF management need to consider how this can be done most effectively and efficiently.
- C. **Level to which especially for Orange Corners (and to some extent for OCIF) should focus more on the stages preceding and stages following the actual incubator and accelerator programme?** Our recommendation is to step up these pre- and post-Orange Corners and post-OCIF support activities to increase the impact of both programmes.
- D. **Need for an OCIF track III or not?** We suggest that at least for the time being not to invest in a OCIF track III facility. OCIF Track II is only underway for a few years and some extra time is needed to be able to conclude to what extent OCIF II is successful in both developing the business but also to connect the business to follow-up funding, or fund expansion with retained earnings.
- E. **Define personal development goals for Orange Corners and OCIF next to goals in terms of business development or not?** We suggest formulating personal development goals (including transferable entrepreneurial skills) to which OC and OCIF may contribute and to continue monitoring and evaluating this in the near future.

- F. **How homogeneous should the cohorts be?** Our recommendations that – where feasible – to aim for more homogeneity as it would help to increase the effectiveness of Orange Corners.
- G. **Should Orange Corners and OCIF stay sector agnostic or not?** Here we recommend in line with the preceding point to choose for dealing with more homogeneous groups whenever the size of the population of candidate entrepreneurs allows for it.
- H. **Still benefit from the flexibility of the wider PSD Toolkit or develop into an independent and better visible Orange Corners and OCIF instrument?** Both options have their pros and cons, however given the size, the number of regions and budget involved we recommend a separate budget code for Orange Corners and OCIF and increase its visibility (and accountability).
- I. **Leverage the Dutch investment in supporting entrepreneurship for development purposes by teaming up other donors or not?** We sketched the pros and cons of both options. A political decision is needed for making a choice here.

1 Introduction

Dialogic in consortium with the Utrecht University School of Economics has evaluated the Orange Corners and Orange Corners Innovation Fund (OCIF) programmes on behalf of the Netherlands Enterprise Agency (RVO). The aim of the evaluation is to gain a better understanding of the contribution of the Orange Corners and OCIF programmes to participating young entrepreneurs and their businesses. Based on this understanding recommendations and a practical roadmap that allows Orange Corners and OCIF to maximize their impact are developed.

1.1 Cause and context evaluation

The Orange Corners programme is an initiative by the Dutch Ministry of Foreign Affairs, executed and managed by the Netherlands Enterprise Agency (RVO). The initiative is aimed at young entrepreneurs between 18 and 35 years old in countries in Africa, the Middle East and Asia. The programme aims to support these young entrepreneurs in turning their innovative ideas into successful start-ups. Part of Orange Corners are the Orange Corners incubation and acceleration programmes that give young entrepreneurs access to training, networks and facilities to launch or scale their business. The Orange Corners Innovation Fund (OCIF) supplements this by providing flexible financing at an early stage to foster business growth and increase employment. OCIF consists of two tracks: In OCIF Track I, the fund can provide a maximum of €5000 to an entrepreneur enrolled in the OC incubation and acceleration programme. Entrepreneurs who have successfully completed this programme are eligible to receive OCIF Track II funding which consists of a maximum of €50.000 (part loan and part subsidy).

Orange Corners and OCIF are part of the Private Sector Development (PSD) Toolkit. This toolkit helps Dutch foreign missions with their PSD activities. In 2022 a midterm evaluation of the Toolkit focusing on the combined results of all PSD Toolkit programmes was conducted.³ For insights into the workings of Orange Corners this review was valuable, but due to the limited scope and scale of the evaluation not specific enough to zoom in on the possible effects of the Orange Corners programme. Additionally, in 2022, the Ministry of Foreign Affairs published a report on the impact of the OCIF programme and gave concrete recommendations for future programming.⁴ This current evaluation is meant to provide more insights into the working and effectiveness of both the Orange Corners and the OCIF programmes.

The focus of the evaluation is on understanding the main medium-term effects (i.e. three years after the treatment) of the Orange Corners training programme and OCIF on its beneficiaries (young entrepreneurs) and their businesses. Furthermore, this evaluation looks into the variety between programme locations, the wider challenges of the entrepreneurial ecosystems and provides recommendations for improvements.

1.2 Research objectives and research questions

The main research question is: *What have been the medium-term outcomes of Orange Corners and OCIF on the youth entrepreneurs who have participated in these programmes?* The evaluation is conducted by looking at five central themes:

³ Oomes et al. (2022), *RVO's Private Sector Development Apps and Toolkit*. [www.seo.nl]

⁴ Ministry of Foreign Affairs (2022), *OCIF Impact Report 2019-2022*. [www.orangecorners.com]

- 1) the outreach and variety in effect of the programmes.
- 2) the personal development of participants.
- 3) the development of the business of the participants.
- 4) the wider challenges of the entrepreneurial ecosystems where the programmes are active and the role of the implementing organisations.
- 5) improvements and recommendations for the programmes.

More detailed research questions were formulated for these five themes. These are included in Appendix 1

1.3 Research design

For this evaluation we have used five different research methods: desk research, interviews, portfolio analyses, surveying, and case studies (which also largely consists of interviews). A more detailed and systematic overview of our research design is included in Appendix 1.

We kicked off the research during a kick off meeting with the steering committee overseeing the evaluation (WP1).⁵ We subsequently started the desk research (WP2) to analyse existing documentation, including Orange Corners and OCIF progress reports, cohort reports, annual reports, and delivery plans as well as relevant policy documentation to better understand the policy context of both programmes. During the execution of this work package, we compiled the available information and systematically analysed the documents to partially address specific research questions. Additionally, we integrated the results from existing pre, ex-durante, and ex-ante surveys into an Excel database to obtain a comprehensive view of the entire programme. This proved more laborious and complicated than anticipated as the data were less well organised than anticipated. We used this aggregated database and supplement it with additional information, such as cohort reports, to enhance our understanding of the data and conduct aggregated analyses. In this evaluation three main surveys have been used. Given their different sources and methodologies these will be seen as separate sources of information and will be referred to separately. The first two are the *Quarterly reports* and the *Programme survey*. These were both collected by RVO prior to this evaluation and used for the portfolio-analysis based on RVO-data (see appendix 2). The third is the *follow-up survey* which has been sent out specifically for this outcome evaluation and which we will discuss separately below.

In parallel, WP3 involves conducting interviews with programme management and implementing partners (mostly in the five countries where we planned case studies as these helped to prepare the ground for the five case studies as well) to gain qualitative insights about the two policy programmes, its implementation and the relevant policy context (WP3). These interviews, alongside those with the survey amongst the entrepreneurs (WP5) and interviews with the entrepreneurs (WP7), provide valuable details about the programme, its implementation, results, and challenges. These interviews were held primarily online. The insights from these interviews – an overview of interview partners is included in Appendix 4 – were also used to identify potential focus points for subsequent work packages.⁶

⁵ After having dived into the programme by visiting the Orange Corner Connect days in June 2024.

⁶ As part of the subsequent case studies in five hubs we interviewed alumni, representatives of the implementing organizations and other stakeholders either face to face (in Egypt, Morocco and Nigeria) or online (Kurdistan region in Iraq, Senegal). In total 101 persons were interviewed (see appendix 4).

In parallel, we analysed the combined data from WP2 through portfolio analyses based on RVO-data i.e. RVO quarterly report and RVO Programme survey data (WP4). These data helped us to gain quantitative insights into Orange Corners and OCIF, including descriptive statistics on outreach based on existing cohort reports and existing surveys. This overview is essential in understanding the distribution of participants across various characteristics and to assess how effects differ among participant types. Here we had to deal with considerable flaws in the data provided. A more detailed account of how we dealt with these data is included in Appendix 4.

To acquire more information regarding personal development and business development after completion of the Orange Corners program, a follow-up survey was set out during the duration of this evaluation (WP5). This proved to be a valuable component of the research performed as it helped us in getting a better and more detailed understanding of the medium-term outcome of both Orange Corners and OCIF. In the follow-up survey all Orange Corners cohorts from 2021 were included. To increase the response rate, the survey was made available in the following languages: Arabic, English, French, Kurdish, and Portuguese. Alumni received a single email containing links to the various translations of the survey. They were able to choose for themselves in which language they completed the questionnaire. The survey was sent to 508 Orange Corners/OCIF alumni, of which 159 completed the survey (a response rate of 32%). Various reminders were sent to acquire more responses. The degree to which particular outcomes – such as high survival rate – is explained by selection or treatment effects cannot be discerned in this study. However, it is likely that respondents with a successful business are more likely to complete our questionnaire and therefore some bias in the outcome reported through the survey is possible. A more detailed account of especially the background characteristics of the alumni that completed the follow-up survey is given in Appendix 5.

In a separate work package, we attempted to conduct a comparative analysis of the OC and OCIF programmes using data from the follow-up survey in combination with quarterly reports and the RVO programme survey (WP6). Due to the low sample size this analysis proved difficult to use for answering any of the research questions.⁷ As Orange Corners has been implemented differently across various locations, it would be challenging to compare long-term effects by sector, business stage, or gender without differentiating by hub. However, the number of respondents is too low to allow for such a breakdown, resulting in too few respondents per category to draw reliable conclusions. As a result, the comparative analyses would not yield valid results. We therefore deem the comparative analysis unsuitable for answering research question 2. Furthermore, the other research questions we initially intended to address through the comparative analysis could be answered based on the follow-up survey.

A considerable part of the study performed involved a series of 5 case studies (WP7). These were deep-dive case studies of five hubs, whereby we aimed to interview in each hub at least six entrepreneurs that participated in the Orange Corners/OCIF program, and a control group of six entrepreneurs that were selected in the bootcamp of the Orange Corners programme but were not selected for the full Orange Corners programme. These entrepreneurs should be a random selection from these two groups: the selection logic is that the participants in the bootcamp that had not been selected for the full program are the best possible control group to trace the effect of the Orange Corners program on the participants that also

⁷ We were able to link data from the Programme survey to our own survey (the follow-up survey) when the same person filled in both, linked to a personal ID code that was assigned to the respondent. The eventual number of participants for which we were able to make this link was low: in total 97 respondents in the current Dialogic survey also responded to one of the earlier Programme surveys.

participated in the bootcamp but made it into the full program. It turned out that the local implementing partner could not provide access to at least six participating entrepreneurs and a control group of six entrepreneurs in the research period, which has led to smaller groups of interviewed entrepreneurs per hub (see Appendix 3). We also interviewed three members of each of the implementing partners responsible for Orange Corners and OCIF. Subsequently, we organised a roundtable with a broad set of entrepreneurial ecosystem stakeholders, including entrepreneurs, the implementing partners, banks, education institutes, policy makers, the Dutch embassy / consulate and other stakeholders in three of the five case study hubs. At this roundtable, we discussed the impact of Orange Corners/OCIF (i.e. validation and suggestions for improvement). These roundtables have been on site with local partners (in Marrakech, Morocco; in Cairo, Egypt; in Lagos, Nigeria). The roundtables in the Kurdistan region in Iraq and in Dakar (Senegal) proved impossible to organise in a timely manner, but we were able to at least discuss with the consulate in Erbil how they contribute to Orange Corners/OCIF and the impact of Orange Corners/OCIF in the Kurdistan region in Iraq. The roundtables were used to validate the insights of the interviews with the entrepreneurs and implementing partners and confronted these findings with the local knowledge of the entrepreneurs and other stakeholders of the programme and the entrepreneurial ecosystem at large, in open dialogues. This was used to make sense of our previous findings and build up a more detailed knowledge base on how the Orange Corners/OCIF interventions work and how they can be improved, for the development of entrepreneurs, their businesses and the entrepreneurial ecosystems at large. The case studies integrated the findings of the previous work packages with in-depth local knowledge and were helpful in creating a detailed overview of how the Orange Corners/OCIF interventions affected and are affected by local contexts. In appendix 6 it is explained how – in consultation with RVO – the case study hubs were selected.

Overall, it is important to note here that responding entrepreneurs do also not differentiate between the original design and the actual implementation of the programmes as they mainly reflect on how they perceive the programmes as delivered

Eventually the insights from all previous work packages were analysed and integrated in this report (WP8). It offered an extra opportunity to confront and cross-validate the results of the various work packages.

1.4 Reading guide

The report is structured along the lines of the conceptual model as depicted below. At the core of the analysis are the “treatments” i.e. beneficiaries of the programmes that used Orange Corners only, Orange Corners in combination with an OCIF track I or in combination with a more substantial Orange Corners in combination with OCIF track II. We are primarily interested into how these various treatments (hence the triangle or delta) impact the personal development of the young entrepreneurs involved and the business development of the firms involved. More specifically we want to assess the medium-term outcomes (hence the focus on the 2021 cohort of Orange Corners and OCIF) on the youth entrepreneurs who have participated in these programmes.

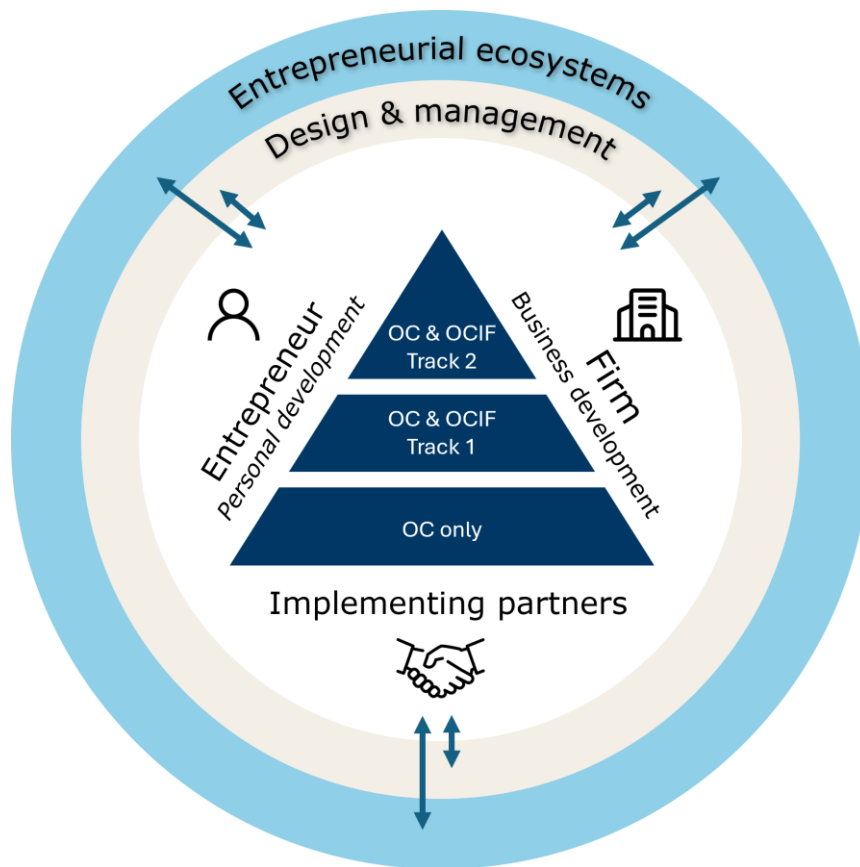


Figure 1. Conceptual model: focusing on the delta in the medium-term outcome evaluation of Orange Corners & OCIF

For this report we deliberately choose to stay close to the original set of research questions posed and the way these were structured using the conceptual model as presented in Figure 1. This means that the questions to be answered are used for structuring the text rather than the research methods (to prevent duplication and to benefit from triangulation). We will mention which results are derived from what research method. In chapter 2 we describe the background of Orange Corners and OCIF, their main characteristics as well as the wider policy context in which both programmes have evolved. From chapter 3 onwards we start answering the research questions as outlined in this chapter. In chapter 3 we discuss the outreach of both programmes. In chapter 4 we discuss the business development of participants of both programmes and in chapter 5 the personal development. At present, the Orange Corners programme has not outlined specific goals/metrics for the personal development of entrepreneurs. Therefore, the main objective of the latter chapter is to better understand what the effects of the programme are at the personal level. In chapter 6 we discuss the wider entrepreneurial ecosystem and the role of the implementing partners. In subsequent chapters we conclude (Chapter 7) and formulate recommendations, both for the future development of both programmes as well as its future evaluation (Chapter 8).

2 Background

In this chapter we will briefly lay out the policy context of Orange Corners and the Orange Corners Innovation Fund (OCIF). We will then give a description of both programmes and introduce some distinguishing features of the programme. We finish this chapter with insights from previous evaluations of the programmes.

2.1 Policy context

2.1.1 Investing in Global Prospects

An important publication in the development of the Orange Corners programme was the policy document 'Investing in Global Prospects' from the Ministry of Foreign Trade and Development Cooperation (BHOS) in 2018. In this document the Minister emphasises the importance of the private sector for development. In many developing countries a better business climate is needed, which is expected to lead to structural improvements for local entrepreneurs and present opportunities to grow and diversify the economy. The goal of this policy document with regards to the private sector is to increase productivity and promote economic growth that specifically helps increase the labour participation and prosperity of poor, vulnerable groups. It stated that the Dutch government would therefore invest in the necessary conditions for local entrepreneurship.⁸ The Minister also announced that "...extra funds would be allocated to encourage businesses (especially SMEs), by applying the successful Small Business Innovation Research (SBIR) tool and setting out various challenges, to apply their knowledge and expertise to develop new products and services tailored to local development needs".⁹

In response to this document, €5 million was made structurally available yearly to stimulate the private sector to develop innovations for local, developmental challenges. The policy document refers to the Orange Corners as platforms that focus on facilitating local entrepreneurship. Although OCIF was not mentioned in this document, with this new strategy and focus on entrepreneurship the OCIF programme was initiated in 2019. This programme was and is aimed at providing funding for entrepreneurs in developing countries, to create startups and scale ups with their own innovative business ideas.¹⁰

2.1.2 Youth at Heart

Besides a shift to local entrepreneurship, the policy document 'Investing in Global Prospects' also introduced a shift in focus to the unstable regions of the Sahel, the Horn of Africa, the Middle East and North Africa.¹¹ The majority of these countries have very young populations. Over 50% of the youth in Africa and the Middle East face challenges in contributing to the economy, where there is a mismatch between the available skills and job opportunities for young people.¹²

The Netherlands is therefore increasingly putting youth at the heart of its development policies and investing in education and youth development.¹³ In addition to the strategy

⁸ Minister of Foreign Trade and Development Cooperation (2018), *Investing in Global Prospects*, p. 57

⁹ Minister of Foreign Trade and Development Cooperation (2018), *Investing in Global Prospects*, p. 59

¹⁰ OCIF BEMO

¹¹ Minister of Foreign Trade and Development Cooperation (2018), *Investing in Global Prospects*

¹² Orange Corners An initiative of the Kingdom of the Netherlands, non-dated presentation Orange Corners programme, RVO.

¹³ Minister of Foreign Trade and Development Cooperation (2018), *Investing in Global Prospects*.

presented in 'Investing in Global Prospects', the Ministry of Foreign Affairs published its 'Youth at Heart' strategy in 2020. With this strategy, the Ministry aims to improve prospects for young people through an approach that bridges the gap between the skills young people learn and the demands of the labour market. To achieve this, the Ministry works with a range of partners, including partners from the private sector.¹⁴

The 'Youth at Heart' strategy encompasses a few different (actual and finished) programmes¹⁵.

- The **Challenge Fund for Youth Employment (CFYE)** has sought to create prospects for 200,000 young people in the focus regions (in the 15 to 35 age group, women and men equally) by investing in decent work and income.
- The Netherlands has supported young women and men in the focus regions in making the transition from education to decent work or a better income through the **Nexus Skills and Jobs programme**.
- Partnership for improving prospects for forcibly displaced persons and host communities (**PROSPECTS**) has aimed to provide refugees, displaced persons and their host communities with decent protection and opportunities for education and work.
- The multi-stakeholder partnership **Generation Unlimited** has sought to support young people in developing the skills needed for successful entry onto the labour market.
- The **Local Employment in Africa for Development (LEAD)** programme has been aiming to help young people in starting their own business, strengthening the ecosystem for enterprise, increasing young people's employability and helping businesses grow so that new jobs can be created for young people.
- The **Youth Entrepreneurship and Innovation Multi-Donor Trust Fund** is part of the African Development Bank's Jobs for Youth in Africa strategy, which has aimed to create 25 million jobs and provide 50 million young Africans with the skills needed for a formal job.
- And lastly; The **Orange Corners Innovation Fund (OCIF)** was launched to supplement the existing Orange Corners programme, which gives young entrepreneurs access to training, networks and facilities, enabling them to start or upscale their businesses. And most importantly, its innovation fund gives entrepreneurs more access to funding.

2.1.3 Private Sector Development (PSD) Toolkit

A strong small and medium-sized enterprise (SME) sector is essential for sustainable economic growth. SMEs create jobs and combat poverty and inequality. The Netherlands supports private sector development (PSD) worldwide. PSD focuses on local SMEs, the business environment and fair value chains.¹⁶ The PSD Toolkit was initiated in 2013 (initially as 'PSD-apps') as a flexible toolkit with which embassies and consulates can quickly and flexibly respond to local questions and challenges regarding PSD.¹⁷

On behalf of the Ministry of Foreign Affairs, the Netherlands Enterprise Agency (RVO) commissions multiple PSD programmes in this Toolkit. The programmes and interventions from

¹⁴ Minister of Foreign Affairs (2020), *Youth at Heart. Young people at the heart of Dutch development cooperation*.

¹⁵ Minister of Foreign Affairs (2020), *Youth at Heart. Young people at the heart of Dutch development cooperation*, p. 6-7.

¹⁶ See: [www.rvo.nl]

¹⁷ PSD Toolkit 2019 t/m 2023 BEMO

the PSD Toolkit aim to stimulate private sector development in beneficiary countries (in)directly through three key pathways¹⁸:

1. **Improving business development**, i.e., developing a professional and successful local private sector for small and medium-sized enterprises (SMEs).
2. **Improving the enabling environment**, including local conditions for entrepreneurial success.
3. **Improving information and networks**, supporting more effective economic diplomacy.

The Orange Corners programme is one of the programmes in the PSD Toolkit. In 2019, because of the publication of 'Investing in Global Prospects', the Orange Corners Innovation Fund (OCIF) programme was also initiated and added to the Toolkit. The budget of the PSD Toolkit 2024-2028 is approximately €30 million per year (€150 million for five years). This budget is partially dedicated to certain programmes (such as Orange Corners and OCIF) and can partially be spent more freely by the embassy in the target location depending on the local needs and challenges.¹⁹ This way of budgeting provides flexibility with regards to moving leftover budget between the different programmes in the PSD Toolkit.

2.2 Description of the programme

Orange Corners is an initiative that supports young entrepreneurs between 18 and 35 years old with turning their innovative ideas into successful start-ups. Orange Corners started as an incubation programme in South Africa in 2016. The lessons that were learned in that pilot phase were used to create a blueprint for other Orange Corners. This blueprint provides space and flexibility for the local context. At present, Orange Corners has 22 active hubs in 19 countries. Most of the hubs (17) are situated in Africa: Algeria, Angola, Burundi, Côte d'Ivoire, Egypt, Ghana, Mali, Morocco, Morocco (Sports Orange Corners), Mozambique, Nigeria, République Démocratique du Congo, Senegal, South Africa, South Africa (Orange Corners Designs), South Sudan, Sudan. There are four hubs in the Middle East: Iraq (Baghdad), Iraq (Kurdistan Region), Jordan and the Palestinian Territories. The other part of Asia has only one hub: Bangladesh. New Orange Corners projects are usually initiated after interest from Dutch embassies and are selected based on the context of the location and the gaps in the ecosystem for young entrepreneurs.

The Orange Corners Programme is carried out by RVO as a separate module under the PSD Toolkit and has its own dedicated staff, monitoring framework, website, and marketing. The main aim of the Orange Corners programme is to tackle unemployment by increasing opportunities for youth to build their own future and contribute to a prosperous, sustainable, and inclusive society for themselves and others. Young trailblazers are supported with training and tailored support, relevant networks, and access to various resources to innovate and grow their companies in local incubators and accelerators.²⁰

The Orange Corners programme supports young entrepreneurs with:

1. Training sessions (incubation and acceleration).
2. Access to funding.
3. Improving the ecosystem.

¹⁸ Oomes et al. (2022), *RVO's Private Sector Development Apps and Toolkit*. [www.seo.nl]

¹⁹ Ministry of Foreign Affairs (2023), *Memo PSD Toolkit 24-28*

²⁰ Ministry of Foreign Affairs (2022), *OCIF Impact Report 2019-2022*. [www.orangecorners.com]

Orange Corners follows an ecosystem approach, where components of the programme do not only focus on youth entrepreneurs themselves, but also the broader entrepreneurial ecosystem. Figure 2 below shows the different ways in which Orange Corners aims to change and impact the ecosystem for young entrepreneurs to succeed. Activities under the Orange Corners flag are designed for the local context and based on an entrepreneurial ecosystem mapping which is performed as a start-up activity when the Orange Corners programme is initiated in a region. Over time, this analysis is kept up to-date and every three years a new entrepreneurial ecosystem mapping is developed. This means that Orange Corners activities can be adapted and tailored to the gaps identified within each entrepreneurial ecosystem.²¹

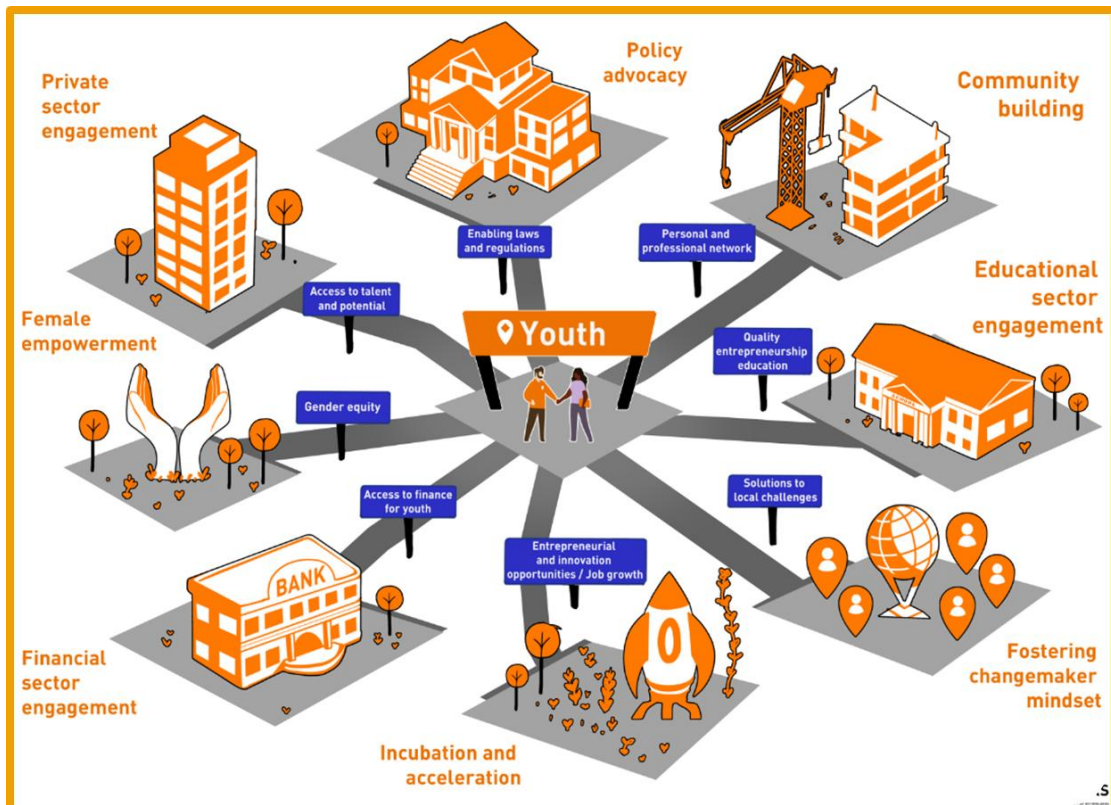


Figure 2. The ecosystem approach of supporting youth in Orange Corners/OCIF countries. Different programmes can influence different domains of change and help empower the local youth (Source: RVO)

This current evaluation solely focuses on the training and funding component of Orange Corners and evaluates its effects on participants and their businesses. In the sections below we will introduce these two components.

2.2.1 Orange Corners incubation and acceleration programmes

The Orange Corners incubation and acceleration programmes provides funding for entrepreneurial training programmes (incubation and acceleration) for the target group of Orange Corners (young entrepreneurs between the ages of 18 and 35 in target countries). The funds available for these programmes are used to award grants to local businesses and local civil society organisations to implement activities that contribute to the goal of the programmes (local implementing partners). These implementing partners use the frameworks provided

²¹ Staatscourant 2023, 26169

by these programmes and are asked to adapt the programmes such that these fit within the local context.

When launching a new subsidy round as of 2023 (and operational since 2024) the three objectives of the incubation and acceleration programmes (on top of the overall objective of the OC-programme to strengthen the local ecosystems for young entrepreneurs) were formulated as follows²²:

1. **Main objective: start incubation and acceleration programmes.** The subsidy programme provides financial support to local businesses and civil society organisations so they can set up entrepreneurial training (incubation and/or acceleration) programmes. These give participants access to training, mentorship, networks and facilities to start or grow their business.
2. **Secondary objective: Raising awareness of entrepreneurship and encouraging young people's entrepreneurial spirit and skills.** The subsidy programme contributes to wider awareness and knowledge of entrepreneurship in the target location and promotes the development of entrepreneurial spirit and skills, among young people in education and recent graduates. Raising the profile of local Orange Corners activities, and thus promoting training pipelines at local level, also raises awareness of entrepreneurship as a possible career path for young people.
3. **Tertiary objective: Strengthening the capacity of the grant recipients.** The subsidy programme aims to strengthen the capacity of local businesses and civil society organisations implementing the training programmes (the grant recipients). Strengthening capacity is a way of emphasising the sustainability and self-reliance of these local organisations. This improves the quality of the activities and increases the likelihood that the initiatives funded by the grant programme will be continued after the grant period. This also makes the role played by Dutch support more relevant in an international context.

After a few years of piloting and developing Orange Corners, the subsidy programme Orange Corners 2024-2028 was announced in 2023. In this programme, local implementing organisations can apply for a grant to develop incubator and accelerator training programmes and activities aimed at the other objectives of the subsidy programme. This local organisation must have experience in developing and managing entrepreneurial training programmes (incubation/acceleration). A total budget of €12 million was available for the first two subsidy rounds in 2023. The local implementing partners could apply for a subsidy of up to 75% of the total project costs²³, up to a maximum of €750.000.²⁴ The 2023 opening for 16 locations was for five years (2024-2028). A third subsidy round was announced in March 2024 and was specifically aimed at the target locations of the Palestinian Territories and Senegal. Local partners could again apply for a subsidy of up to 75% of the total project costs, but now with a maximum of up to €600.000 in each target location. Only one subsidy could be provided per target location. Finally, the project must run for four years, between 1 January 2025 and 31 December 2028.²⁵

With the subsidy the local implementing partner develops and organises activities for local young entrepreneurs. The most important activity is the development of the incubation or acceleration training program, but the organisation also has to offer additional activities,

²² Staatscourant 2023, 11115

²³ This means that the local implementing partners need to bring funding for 25% of the project costs themselves.

²⁴ Staatscourant 2023, 11115

²⁵ Staatscourant 2024, 7605

such as business development services, networking activities and maintaining an alumni network. The local organisation needs to select a minimum of 30 young entrepreneurs a year to participate in the four-to-six-month training programme.²⁶ These entrepreneurs form a cohort that receives financial support from OCIF Track I (see next section on OCIF). In this evaluation we mainly focus on the cohorts that started in 2021, to observe possible effects of the trainings and participation in Orange Corners after three years.

2.2.2 Orange Corners Innovation Fund (OCIF)

The Orange Corners Innovation Fund (OCIF) Grant Programme was launched to supplement the OC incubation and acceleration programmes. The OCIF grant programme focuses on supporting startups in the initial phase of their innovation process. It was found that startups in Africa, the Middle East and Asia needed support for both knowledge and finance to develop and scale up innovations. Especially in the pre-commercial phase of the innovation process (ideation, research and development, and proof of concept), in which an idea is tested and a prototype developed, only limited funding was available. In this phase it was often impossible for entrepreneurs in developing countries to attract the capital they needed, due partly to an unattractive risk profile and the high interest rates that local banks charge for loans. Companies had to be supported to bridge this pioneer gap and enable them to grow.²⁷

The OCIF grant programme has three short-term aims:

1. Encourage young entrepreneurs in Africa, the Middle East and Asia to build successful companies based on providing innovative solutions to major local challenges.
2. Enable young entrepreneurs in Africa, the Middle East and Asia to scale up their company and create jobs.
3. Enable young entrepreneurs in Africa, the Middle East and Asia to attract commercial or other follow-up funding.

In the long-term this must contribute to young entrepreneurs in Africa, the Middle East and Asia to scale up their company, create jobs, strengthen the local entrepreneurial ecosystem and help solve local societal problems.²⁸

Similarly to the OC incubation and acceleration programmes OCIF utilises local implementing partners. This local fund manager must have experience with managing an investment fund and must be legally authorised in the target location to provide loans. The ultimate target group in these target locations consists of startups that have an innovative business plan. Preferably these participants have previously taken part in a training from Orange Corners incubation or acceleration programmes.²⁹

Three types of activities are eligible for OCIF subsidy³⁰:

1. **Provision of financing in Track I and Track II** (see Figure 3).
 - I. Track I activities entail support for startups participating in the Orange Corners incubation or acceleration programmes. Support can be provided for starting and building a company. For instance, funding can be provided for registering a company, developing a prototype or new products and services, engaging third parties, and other means necessary to building innovative, sustainable companies. During Track I, support may also be provided to help

²⁶ Staatscourant 2023, 11115

²⁷ Staatscourant 2023, 26169

²⁸ Staatscourant 2023, 26169

²⁹ Staatscourant 2023, 26169

³⁰ Staatscourant 2023, 26169

a company prepare for selection for Track II. Track I has the same duration as the incubation or acceleration programme in the target location (an average of six months). Track I financing consists of a grant of no more than €5,000 for each individual entrepreneur. This €5000 includes part monthly allowance and part prototype voucher.

- II. Track II activities involve additional support to the most promising companies, preferably companies that have completed Track I activities, which are selected during one or more selection days. These companies will have access a larger amount of capital, which can consist of a loan (which may or may not be interest-bearing) and/or a grant. The composition of the capital depends on the local situation, but it may not amount to more than €50,000 for each individual entrepreneur. The capital will be paid out to the entrepreneur in several tranches based on previously agreed Key Performance Indicators (KPIs). The applicant will develop an implementation plan and a selection process for this purpose. The funding is meant to support business development for 12 to 18 months.
2. **Technical assistance to promote investment-readiness.** Participation in incubation or acceleration programmes does not always result in the selected entrepreneurs being able to meet all the requirements for a commercial loan. Additional training, coaching and mentorship can enhance investment-readiness. This technical assistance will be provided based on a needs assessment and must be agreed with the Orange Corners incubation or acceleration programmes.
3. **Network support and follow-up financing.** Some young entrepreneurs will need follow-up financing to enable their company's continued growth. To this end, activities can be organised to put entrepreneurs in touch with local and international investors, such as angel investors, venture capital funds, commercial banks or other appropriate parties. Efforts will be aligned as much as possible with other funds and programmes financed by the Dutch government. There are also opportunities to improve market access by actively putting young entrepreneurs from different target locations in touch with one another.



Figure 3. OCIF setup of Track I and Track II³¹

³¹ Orange Corners An initiative of the Kingdom of the Netherlands, non-dated presentation Orange Corners programme, RVO.

From 2019-2021, OCIF was piloted in 5 countries: Senegal, Nigeria, Morocco, Ivory Coast and Sudan. In the period 2021-2025 it was a full-fledged subsidy program, open to 9 target locations.³² The total budget was €12.6 million and local fund managers could apply for a subsidy of up to €1.4 million per target location.³³ Both the 2019-2021 pilot and the first year of the 2021-2025 subsidy program were subsequently included in the positive OCIF impact evaluation that formed the basis for the decision to make OCIF available in all OC regions.³⁴ Subsequently, with the Orange Corners grant programme, the OCIF Grant Programme 2024-2030³⁵ was also announced. This programme is available for all Orange Corners hubs and Tunisia and has a total budget of €46.2 million. Per target location a subsidy of up to €2.2 million is available.³⁶ Subsidies will be awarded for no more than 95% of the eligible costs. This means that private companies or NGOs must provide their own contribution of at least 5% of the eligible costs. The maximum subsidy amount does not include the 5% own contribution.³⁷

Mainly due to the favourable evaluation of the first years of OCIF and the prolongation of OCIF till 2030 every new Orange Corners will automatically also get an OCIF and existing Orange Corners that currently do not have an OCIF yet are in the process of finding a local fund manager. In theory, Orange Corners and OCIF could expand to every country that has access to the PSD Toolkit.³⁸ Currently twelve additional regions are interested in acquiring Orange Corners and OCIF, and three are interested in acquiring only OCIF.

2.3 Distinguishing features of the programme

One of the distinguishing features of Orange Corners is its **integral approach**. What distinguishes Orange Corners and OCIF is the combination of training and funding, especially with funding at the pre-commercial stage.

The **ecosystem approach** adopted (which is also used in other Youth Entrepreneurship programmes) also makes Orange Corners **adaptable to the local context**. In every location the ecosystem is analysed: which programmes are already available and what is needed? In this analysis the education, government, legislation, financing opportunities and partners are mapped. Depending on this local context, the focus of Orange Corners can change, for example on ideation or acceleration.³⁹ The incubation and acceleration programmes of OC and the OCIF programme will be coupled with a series of projects that support the wider development of the local entrepreneurial ecosystem.

Orange Corners further works with **local implementing partners**, who are recruited for implementing the trainings and managing the available funds. Firstly, this leads to institutional development and support intermediaries who can run programmes like this locally. It also makes that the programme is embedded in the local context. Another benefit is that Orange Corners does not require the building of new infrastructures, which is something that

³² Ghana, Iraq-Baghdad, Iraq-Erbil, Ivory Coast, Morocco, Mozambique, Nigeria, Senegal and Sudan.

³³ Staatscourant 2021, 11106

³⁴ Ministry of Foreign Affairs (2022), *OCIF Impact Report 2019-2022*. [www.orangecorners.com]. More details are included in section 2.4.

³⁵ This is two years longer than OC incubation and acceleration programme projects for participants of OC incubation and acceleration programmes to still be able to be supported for two years by OCIF after completing the training.

³⁶ Staatscourant 2023, 25677

³⁷ Information from the RVO website: [english.rvo.nl]

³⁸ For an overview of the countries see the RVO website: [www.rvo.nl]

³⁹ Although the programme is essentially sector-agnostic, especially embassies might have priority sectors. However, as it is not always that easy to find enough candidates that can participate in the Orange Corners programmes sector is not a very strict requirement in practice.

other foreign donors or private organisations can struggle with. Orange Corners explicitly also invests in capacity building of these local organisations, such that similar activities could continue with other sources of funding if the Dutch government would cease its support in the future.

A last distinguishing feature of Orange Corners compared to similar programmes is that Orange Corners has a very **distinctive branding** and is closely **linked to the embassy**. The clear branding of Orange Corners is highly appreciated by the local embassies, who view the programme as a highly visible and tangible project that well represents their broader development cooperation objectives their activities. Because an Orange Corners hub is only started on the initiative of the embassy, the embassies are closely involved with the programme. This also provides opportunities for the programme on a political level.

2.4 Insights from previous evaluations

As mentioned in Chapter 1, Orange Corners was partially evaluated as part of the midterm evaluation of the PSD Toolkit in 2022. Even though this evaluation had a limited scope with regards to OC, it still provided some first findings into the workings of the programme⁴⁰:

- **The Orange Corners programme is relevant for youth entrepreneurship but less so for youth employment.** In general, the Orange Corners programme fits with embassy PSD strategies, but active embassy involvement is needed to realise the full potential. The ecosystem mapping also helps to focus Orange Corners efforts on the most relevant areas.
- **The Orange Corners programme has been effective in creating a pipeline of young start-ups, and in contributing to business skills, an entrepreneurial mindset and increased networks among young (aspiring) entrepreneurs.** Moreover, it is likely to contribute to job creation in 14 countries. OCIF is a relevant and effective addition helping to overcome the obstacle of 'access to finance'. The Orange Corners incubator remains the core element of the programme with obvious results. Broader interventions towards creating a more conducive ecosystem were effective in delivering intended outputs but their contribution to an improved business climate could not be identified.
- **The additionality of the Orange Corners programme is mixed.** Its input additionality is limited, as there are other programmes offering incubation and coaching services. Its development additionality is more positive and derives from its high quality and the inclusion of access to finance through OCIF.
- **The sustainability of Orange Corners is mixed as well.** On the one hand, there are signs that some results are sustainable, as demonstrated by the number of entrepreneurs that continue their business; growing employment effects; and the lasting contribution to business skills and networks. On the other hand, the Orange Corners programme remains heavily dependent on Orange Corners funding, and it is unlikely that in the foreseeable future the programme can be fully funded by private sector financing.
- **Orange Corners and OCIF have generally been implemented efficiently.** Projects have generally been within budget and on time, with only some incidences of inefficiencies in adapting to local context. Orange Corners has a separate effective M&E structure for incubators/OCIF, with scope for improvement in the M&E of the broader ecosystem approach that RVO is working on.

⁴⁰ Oomes et al. (2022), *RVO's Private Sector Development Apps and Toolkit*, p.5 [www.seo.nl]

The evaluation team also formulated six recommendations to improve the Orange Corners programme going forward:

1. **Keep concentrating on business incubators as a central pathway in the Orange Corners programme** but ensure that the ecosystem mapping periodically and adequately identifies and prioritises positively and negatively contributing factors in the business climate for starting (young) entrepreneurs.
2. **Ensure selection criteria that prioritise participants from marginalised groups** that have less easily access to, and therefore a stronger need for, support, over 'high potentials' that are likely to find their way to alternative support mechanisms.
3. **Continue OCIF and other enabling interventions that help the effectiveness of the incubators**, while ensuring that improving participants' capacity to access finance remains a core element of incubation programme, including connecting participants to other sources of financing.
4. **Stimulate leveraging third-party financing** for instance by supporting and developing capacity of local service providers (LSPs) to successfully raise funds from private sector or other donors, recognising that full self-financing is not a realistic ambition, especially in low-income countries.
5. **Support and encourage LSPs to experiment with delivery models to increase the geographic coverage of the Orange Corners programme** using alternative delivery options (online, hybrid, La Caravane).
6. **Continue the periodic monitoring and evaluation outreach to incubator and OCIF recipients** whilst recognising the need to increase incentives for keeping up response rates over time.

Additionally, in 2022, the Ministry of Foreign Affairs published a report on the impact of the OCIF programme⁴¹. This report concludes that:

- **OCIF is overperforming on business development and improved employment opportunities.** OCIF is a one-of-a-kind opportunity, providing a type of funding which is not readily available in the nascent entrepreneurial ecosystems.
- **OCIF positively contributed to business development and business acceleration.** With OCIF support, businesses are capacitated to purchase assets, raw materials and prototype their innovations. This positively contributed to the growth of the businesses in terms of professionalism and revenue.
- **Through the OCIF young entrepreneurs can test their assumptions and develop prototypes.** To stimulate and realize innovation and business growth these are instrumental steps.
- **OCIF shows the fund managers a different and innovative form of financing** which, in the long run, can result in improved access to finance for starting and innovative entrepreneurs.

This first impact report also presented a few recommendations to improve and increase the impact of OCIF:

1. **Establish a network of OCIF Track II entrepreneurs.** Establish regional connections between entrepreneurs in Track II across the Orange Corners hubs across Africa and the Middle East. This could improve access to markets, more regional trade and growth for the OCIF entrepreneurs.

⁴¹ Ministry of Foreign Affairs (2022), *OCIF Impact Report 2019-2022*. [www.orangecorners.com]

2. **Put more emphasis on linking financial institutions and networks.** The local service providers should put more emphasis on building networks to support entrepreneurs to get follow-up financing.
3. **Stronger focus on digital and green entrepreneurship/innovations.** The focus on digital and green entrepreneurship should be increased, e.g., through changing the selection criteria and target sectors. This allows to contribute to the digital and green transition which can provide new opportunities for employment, income and sustainable economic development. In addition, more focus can be put on certain sectors as this can have the positive effect that entrepreneurs from similar sectors can provide valuable peer-to-peer support.
4. **Develop more specialised products and create flexibility in the financing strategy.** Currently the OCIF grant/loan is one modality. However, as the businesses are from different sectors and have different needs the current modality is not always tailored to the businesses. Businesses, in agriculture for example, are more dependent on seasonality and thus require different financing structures compared to tech ventures. More flexibility in the financing strategy is therefore needed to better adapt to the continuously changing reality of the start-ups instead of the fixed investment strategy currently used.
5. **Support to female owned businesses.** Currently OCIF is behind on achieving its targets to support female entrepreneurship. Local service providers should be stimulated further to experiment with interventions, giving room to certain sectors, putting extra effort in reaching women when promoting the program, and showcasing successful women-led enterprises.

3 Outreach

In this chapter we will focus on the outreach of Orange Corners and OCIF. The main question is: *How are participants (whole population & target group of this outcome evaluation) distributed in terms of location, sector, business stage, political context (political fragility of a particular location) and gender?* We will use these dimensions (location, sector, business stage, political context and gender) in the next chapters to differentiate between different answers. To evaluate the outcome of Orange Corners, we are interested in seeing what the population looks like of those reached by the programme. On the one hand this gives an idea of the population attracted by the programme, while on the other hand it shows where impact is made.

The results below are mainly based on a portfolio analysis (quarterly reports in 2021 and 2022 and the Programme survey) and a follow-up survey (part of this evaluation) in 2024. Herein we apply a cohort scope, in which we only include participants that took part in a programme that started in 2021. See Appendix 4 for the full-length discussion of these analyses. Before we attempt to answer the research questions, we should note that the numbers represented here cannot be taken at face value. They are the best estimate available, yet the portfolio data shows substantial discrepancies, as can be seen by comparing the tables below (between survey and quarterly reports; and with administrative data on running programmes) and as is further detailed in Appendix 4. Since every source of data has its own limitations, we present all the available data source and apply triangulation between these sources.

3.1 Location

In this section we will answer the question: *How are participants distributed in terms of location?* The data does not allow us to give a highly specific answer to this question. However, **there are clear indications that the regions with the highest number of participants are: Cairo, Baghdad, Maputo and Upper Egypt.**

To keep this chapter concise, most of the tables and figures are shown in appendix 2 and 3.

3.1.1 Portfolio analysis

In Chapter 2 we have seen that Orange Corners/OCIF focusses on several specific countries and regions. By analysing the quarterly reports, we were able to construct Table 36 in appendix 2. If we look at applications by youth entrepreneurs, Khartoum is by far the largest region. It has almost half of the total applications. However, if we look at selected participants, we find a more balanced outcome. Large regions are Cairo (Egypt), Baghdad (Iraq), Upper Egypt and Maputo (Mozambique).

Another way of looking at this question is by counting the respondents of the Programme survey. These outcomes can be found in Table 36. It shows that Cairo, Upper Egypt, Accra, Baghdad, Maputo and Lagos have the most respondents. No participants from Senegal have responded to the survey sent out by RVO.

3.1.2 Follow-up survey

The responses to our own conducted survey in 2024 show a similar distribution of respondents, where most responses come from the regions of Egypt, Mozambique, Côte d'Ivoire and

Nigeria. Since some regions were more active in approaching and reminding potential respondents, some biases will occur.

3.2 Sector

In this section we will answer the question: *How are participants distributed in terms of sector?* The answer to this question is that **we see a highly diversified pattern with many different sectors. Agriculture seems to be the most important sector: 20% of the participants are active in this sector.**

In this section we will also answer the following question (with a sectoral component): *What are signs that Orange Corners and OCIF enabled young entrepreneurs to tackle local challenges?* The answer to this question is: From anecdotal evidence it could be established that **some entrepreneurs that participated in the Orange Corner programme were able to deal with local challenges like waste recycling and housing. However, we cannot assess to what extent this is more common under OC-participants as compared to young entrepreneurs not participating in the OC programme.**

3.2.1 Portfolio analysis

By taking the data from the RVO-survey and looking at the distribution of sectors, we were able to construct Table 39. This shows that there is a large amount of diversity and that there are many sectors in which participants are active. However, it also shows that *agriculture* is the most important sector. We see that almost 20% of the respondents is active in this sector. Other large sectors are:

- Education
- Food, Drinks, Entertainment
- Health, Safety
- Internet and Communication Technology (ICT)
- Professional / Business services

When looking at country specific patterns, we conclude that Iraq has a distinct profile. It focuses much less on agriculture and more on high value-added services like ICT, health and professional/business services.

In the RVO-survey, the respondents were asked "*In three sentences, can you describe what your business does*". We used a large language model to summarize these outcomes. The box below shows these results. These categories are not exhaustive, but they cover the main types of businesses represented in the survey responses.

Box 1. Analyses of the response to the question: "In three sentences, can you describe what your business does"

Based on the survey responses, here is a summary of the main types of businesses:

- **Technology and IT:** Software development and consulting, E-commerce platforms, Artificial intelligence and machine learning solutions, Digital marketing and advertising agencies
- **Health and Wellness:** Healthy food delivery services, Fitness and wellness centres, Health education and awareness campaigns, Medical applications and telemedicine services
- **Agriculture and Food Production:** Farming and agriculture technology (agritech), Food processing and manufacturing, Sustainable farming practices and eco-friendly products

- **E-commerce and Retail:** Online marketplaces for various products, including electronics, fashion, and home goods, E-commerce platforms for specific industries, such as food or beauty products
- **Education and Training:** Online learning platforms and courses, Educational institutions and training centres
- **Creative Industries:** Graphic design and digital art services, Photography and videography studios, Fashion and accessories design and manufacturing
- **Logistics and Transportation:** Delivery and transportation services for various industries, including food and e-commerce
- **Environmental Sustainability:** Renewable energy solutions (solar, wind, etc.), Waste management and recycling services
- **Real Estate and Construction:** Real estate development and partnership solutions
- **Miscellaneous:** Event planning and management, Travel and tourism services, Security and safety services

3.2.2 Follow-up survey

We also asked the respondents of in the Dialogic survey (and whose business was still active) in which sector their business is currently active. A third of the respondents chose the option *other sector*. Like the RVO-survey, almost 20% of the businesses were in *agriculture*.

3.2.3 Interviews

From anecdotal evidence derived from mainly the case study interviews it could be established that the entrepreneurs that participated in the Orange Corner programme developed a wide variety of business, some tackling (SDG-related) local challenges, like waste recycling and housing. Other just provided regular products and services, like particular food or logistic services, that do not directly tackle local challenges (except that they provide income and employment).

3.3 Business stage

In this section we will answer the question: *How are participants distributed in terms of business stage at the time of participation?* **Over 50% participants were in a business stage that is insufficient for sustainable operations before they started to participate in the Orange Corners programme (business stage 1-6). Only 25% had a business with many paying customers (business stage 7) and only a subset of this group (15% of all business) had a profitable business (business stage 8).** About 20% had an unknown stage.

3.3.1 Portfolio analysis

In this section we will focus on the business stage of participants in the pre-programme wave (i.e. the survey submitted before participation in the programme). In Chapter 5 we will look at the development of these businesses. Based on the RVO-survey we can construct a metric that indicates the development of the business. This leads to Table 1 depicted below. We see that only a quarter of the business were on level 7 or 8 and were thus able to have a

sustainable organisation before participation in the programme. Over 50% of the businesses were in early stages of their development.⁴²

Table 1. Distribution of business stage for the pre-programme survey wave⁴³ (n=319). Source: Programme survey

Highest business stage reached	Percentage of participants in the pre-programme wave
Unknown	20%
Stage 1: An idea with concrete plans to start	13%
Stage 2: Validation/MVP (Minimum Viable Product)	8%
Stage 3: Prototype has been built	13%
Stage 4: Business officially registered	6%
Stage 5: Business has a product on the market	5%
Stage 6: Business has first paying customers	12%
Stage 7: Business has many paying customers	10%
Stage 8: Business is making profit	15%

3.4 Political context

In this section we will answer the question: *How are participants distributed in terms of political context?* The answer to this question is: **The more fragile a region, the more applications.** Since the number of selected cases does not vary a lot, this leads to a situation where **potential participants in extreme fragile regions have a very low chance of being selected, whilst participant in nonfragile regions have higher chances (>5x).**

Before we answer this question, we need to define the political context of countries. The following regions are fragile or very fragile. We received this classification from RVO for which they follow the OECD definition⁴⁴.

Table 2. Fragile regions by their type of fragility as classified by RVO in 2021

Region	Fragility
Abidjan, Côte d'Ivoire	Other fragile
Lagos, Nigeria	Other fragile
Luanda, Angola	Other fragile
Maputo, Mozambique	Other fragile
Baghdad, Iraq	Extremely fragile
Darfur, Sudan	Extremely fragile
Erbil, KRI	Extremely fragile
Khartoum, Sudan	Extremely fragile

⁴² We checked whether it is possible to distinguish here between entrepreneurs that received OC, OC+OCIF T1 and OC + OCIF T2. We did receive columns per survey case on OCIF 1 and OCIF 2. However, these columns have been left completely blank. So unfortunately, we can't make this distinction here. Using the follow-up survey, we can find it for some cases in the RVO survey, but that's unfortunately only for a handful of cases.

⁴³ See Table 30 in Appendix 2 for the responses on the other survey waves.

⁴⁴ OECD (2022), States of Fragility 2022, OECD Publishing, Paris, <https://doi.org/10.1787/c7fedf5e-en>.

Region	Fragility
Kinshasa, DRC	Extremely fragile

3.4.1 Portfolio analysis

Based on the quarterly reports, we were able to count the number of applications, selections and completions. We can break this down into three categories: not fragile, other fragile and extremely fragile. We see a high number of applications in extremely fragile regions.⁴⁵ However, we also see that the chances of being selected in these regions is much smaller than in more stable regions. Applications in extremely fragile regions have a 2,5% chance of being selected, while in non-fragile regions this is 13,2%. The programmes have a substantially lower retention rate in fragile contexts (47-50%) than in non-fragile contexts (69%).

Table 3. Overview programme participation by fragility of the region. Source: Quarterly reports

Fragility	#Applied	#Selected	%Selected	#Finished	%Finished
N	5111	294		174	
None	1181	156	13,2%	107	69%
Other fragile	748	58	7,8%	27	47%
Extremely fragile	3182	80	2,5%	40	50%

3.5 Gender

In this section we will answer the question: *How are participants distributed in terms of gender?* The answer to this question is: **Women are slightly underrepresented in Orange Corners/OCIF. Especially in (extremely) fragile counties, there are less women than men. We also see more men in the application phase, but this effect is much smaller in the selection phase. If we look at selected participants in non-fragile countries, women are even slightly overrepresented.**

3.5.1 Portfolio analysis

When looking at the quarterly reports, we see lower female participation rates in all three stages, see Table 40. However, it is also clear the women are much less likely to apply (-24% compared to men), but this gap is much smaller in the selection phase (-10%). Another aspect we find is the huge differences between regions. In Egypt women are overrepresented in the selection phase (up to 58% women), while in Erbil women are vastly underrepresented (less than 25% women) in this phase.

We check the data from the quarterly reports with the data from the Programme survey. We see roughly the same outcomes with women slightly underrepresented (42%), but with large differences between regions, see Figure 24.

The data also allows us to look at the relation between female participation and the fragility of a country, see Table 4. These effects are large. Both the percentage of women that get selected and that finish is lower in (extremely) fragile countries than in non-fragile countries. We have no other data that can explain this lower participation in extremely fragile regions.

⁴⁵ It could be the case that more fragile regions have less programs, which could lead to more applications for OC, but this is only a hypothesis.

Table 4. Overview programme participation by fragility of the region. Source: Quarterly reports

Fragility	Applied % female	Selected % female	Finished % female
N (grand total)	5111	294	174
None	41%	52%	49%
Other fragile	41%	38%	30%
Extremely fragile	36%	36%	35%

3.5.2 Follow-up survey

When we look at the participants that responded to our own survey, 40% is female and 60% is male. When we look at the individual regions in Figure 25 we observe that females are underrepresented in most regions, apart from Angola, Egypt, Mozambique and South Africa.

3.6 Other dimensions

In this section we will answer the question: *How are participants distributed in terms of other dimensions?* The answers to this question (focusing on age) are: **The age of most of the participants is within the target group (18 to 35 years), although there are some outliers. The average age of female participants (27.2 years) is similar to male participants (27.7 years).**

3.6.1 Portfolio analysis

The age distribution in the Programme -survey i.e. during the programme reflects the target age on which Orange Corners focuses (Figure 26), although some participants still appear to be above the age of 35.⁴⁶ Female participants (on average 27.2 years) have a similar average age as male participants (27.7 years).

3.6.2 Follow-up Survey

As shown in Figure 27, there is a slight bias in the age of respondents to our survey compared to the RVO-survey. On January 1st, 2021, respondents to the Dialogic survey were on average 28,2 years old. Female participants are slightly younger (on average 27.7 years), than their male counterparts (on average 28.5 years).

There is no statistically significant correlation between participant age and business stage.

Table 41 in appendix 3 shows a large variety between regions, but it is interesting to note that in a lot of regions the average age is on the higher end of the target age group of 18- to 35-year-olds.

⁴⁶ It is possibly that some of the outliers are due to incidental participation of somewhat older entrepreneurs or participants that made a mistake when filling out the Programme survey.

4 Personal development

This chapter revolves around personal development. The main research question is: *How did Orange Corners alumni personally develop 3 years after following the Orange Corners training programme (and possibly also OCIF Track I, and 1 year after receiving OCIF Track II support), and what was the role of Orange Corners herein?* This breaks down in five specific questions.

1. Which skills and knowledge did alumni acquire during the Orange Corners training programme and which of these do alumni still use in their daily lives?
2. What challenges were alumni facing on a personal level starting their business and to what extent did knowledge/skills gained from Orange Corners training programme help them to overcome these? What examples do alumni have in this context?
3. What income have Orange Corners and OCIF participants been able to create (for themselves) since participating in the programme?
4. To what extent has knowledge/skills gained by the entrepreneurs participating in Orange Corners/OCIF been passed on and diffused to a wider set of persons in their communities and how does this possible wider diffusion work? What examples do alumni have in this context?
5. What are possible wider unintended effects of the Orange Corners/OCIF programmes on the personal development of the alumni (positive and negative)? What examples do alumni have in this context?

We will also address research question 2: *To what extent do effects of participation in Orange Corners/OCIF vary in terms of location, sector, business stage, political context and gender?*

4.1 Skills and knowledge acquired

In this section we will answer two questions: *Which skills and knowledge did alumni acquire during the Orange Corners training programme and which of these do alumni still use in their daily lives? What challenges were alumni facing on a personal level starting their business and to what extent did knowledge/skills gained from Orange Corners training programme help them to overcome these? What examples do alumni have in this context?* In general, **alumni are very positive about the skills and knowledge Orange Corners has brought them. They have become more self-confident, and Orange Corners has taught them entrepreneurial skills, like imagination and opportunity recognition, decision making and financial literacy.** Examples are provided in the text below.

4.1.1 Portfolio

In the Programme survey respondents were asked about the development of their skills due to Orange Corners. Although we see quite a high level of non-response, the remaining answers are very positive.

Table 5. Skills and knowledge acquired via Orange Corners. Source: Programme survey

Question	strongly disagree	disagree	neutral	agree	strongly agree
The skills and knowledge I gained at Orange Corners were helpful in growing my business.	4%	0%	9%	28%	59%
Orange Corners helped improve my 'entrepreneurial mindset'	4%	0%	7%	27%	62%
My mentor from Orange Corners has been helpful in growing my business.	4%	7%	15%	30%	43%

The respondents were also asked to assess the different components of the Orange Corners programme, see Table 6. In general, we see very positive evaluation. Most components are highly valued with over 50% of the respondents giving a score of *very good* or *excellent*. The network events have the lowest rating, but even here we see that 73% score this *good* or higher.

Table 6. Rating of different components of the Orange Corners programme. Source: Programme survey

Question	Poor	Fair	Good	Very good	Excellent
Trainings	0%	5%	23%	26%	46%
Masterclasses	3%	5%	21%	34%	37%
Mentoring	6%	8%	22%	28%	36%
Business coaching	3%	8%	30%	24%	35%
Networking events	10%	17%	27%	23%	23%
Project/Community Manager	6%	12%	21%	26%	35%

Overall assessment of Orange Corners by the participants

In the Programme survey participants were also asked about the positive points of Orange Corners. Overall, the participants appreciated the Orange Corners program's unique blend of training, mentorship, networking, and support, which helped them develop essential business skills and achieve their goals. Here are the key aspects mentioned by the participants as the best experience of the Orange Corners program⁴⁷:

- **Friendly environment and professional staff:** Many participants appreciated the warm and supportive atmosphere of the program, as well as the expertise and guidance provided by the staff.
- **High-quality training sessions:** The variety and effectiveness of the training sessions were highly praised, covering topics such as marketing, finance, branding, and more.
- **Networking opportunities:** Participants valued the chance to connect with other entrepreneurs, mentors, and experts in various fields, which helped them learn from others' experiences and gain new insights.
- **Mentorship and coaching:** The individualised attention and guidance provided by the mentors were considered invaluable, helping participants overcome challenges and improve their projects.

⁴⁷ We used an LLM to summarize those responses from the Programme survey.

- **Practical skills and knowledge:** Participants appreciated the hands-on training sessions that taught them essential business skills, such as financial management, marketing, and project development.
- **Feedback and evaluation:** Many participants praised the constructive feedback they received from mentors and peers, which helped them identify areas for improvement and refine their projects.
- **Inspiration and motivation:** The program's ability to inspire and motivate participants was a common theme, with many expressing gratitude for the opportunities to connect with like-minded entrepreneurs and learn from experienced mentors.
- **Comprehensive support:** Participants appreciated the comprehensive support offered by the Orange Corners team, including technical assistance, business advisory services, and access to funding opportunities.
- **Personal growth and development:** The program's focus on personal growth and entrepreneurship skills was highly valued by participants, who reported feeling more confident and equipped to tackle challenges in their projects.

In the next chapters we will provide more in-depth insights into the relation between the Orange Corners and OCIF programmes with personal development and business development.

Motivation

In the Programme survey participants were also asked why they applied for Orange Corners. Overall, the participants' reasons for applying to the programme were diverse but centred around acquiring knowledge, skills, funding, networking opportunities, and personal development to grow their businesses. The key reasons given by the participants for applying to the Orange Corners programme can be summarised as follows⁴⁸:

1. **Acquiring knowledge and skills:** Many participants wanted to learn more about entrepreneurship, business management, marketing, and finance.
2. **Mentorship and guidance:** Participants sought guidance from experienced professionals and coaches to help them develop their ideas and businesses.
3. **Access to funding:** Funding was a key reason for many participants, as they needed financial support to launch or grow their businesses.
4. **Networking opportunities:** Participants wanted to connect with other entrepreneurs, investors, and industry experts to build relationships and partnerships.
5. **Incubation and acceleration:** Some participants sought the incubation and acceleration services offered by Orange Corners to help them scale up their businesses.
6. **Personal development:** Many participants were looking to develop their entrepreneurial skills and knowledge to become more successful business owners.
7. **Turning ideas into reality:** Participants wanted to take their ideas from concept to reality with the support of the Orange Corners programme.
8. **Access to markets:** Some participants sought access to new markets, customers, and distribution channels through the programme.
9. **Business planning and strategy:** Participants needed help developing business plans, strategies, and models to achieve their goals.
10. **Community and support:** Finally, many participants valued the sense of community and support that Orange Corners offered, which was essential for them to succeed in their entrepreneurial journeys.

⁴⁸ We used a Large Language Model to summarize those responses from the Programme survey.

4.1.2 Follow-up survey

First, we need to know what the level of experience was of participants before they started their business and participated in the programme. We see that more than 45% of respondents scored themselves to have no/limited industry experience. For leadership experience we see a divide into three sections with one third having no/limited experience, a third having moderate experience and the final third having extensive/expert experience. If we look at business ownership experience, we see a shift to a small group having extensive/expert experience (less than 15%) and most having moderate, limited or no experience at all. Females rate themselves lower than males on each category (see Appendix 5). Considering the influence of the OC hub, we see that respondents from the DRC, Mozambique and South Africa also rate themselves below average on industry experience and business owner experience. The respondents from South-Africa additionally rate themselves lower on leadership experience as well.

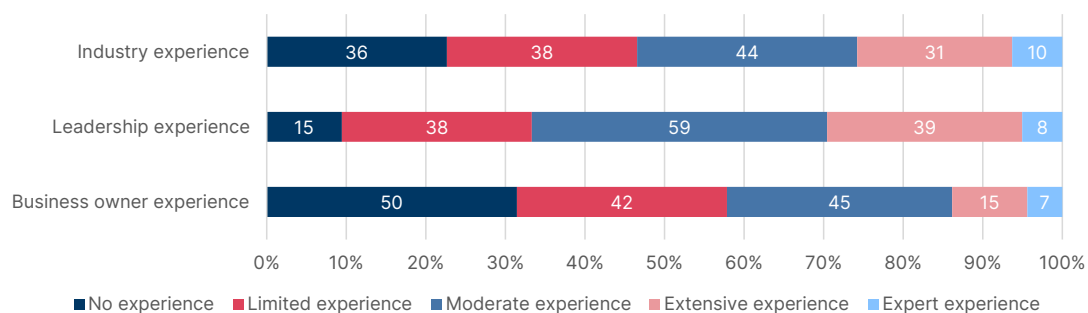


Figure 4. Respondents rating themselves on industry, leadership and business ownership experience prior to participating in OC (n=159). Source: Dialogic survey

The Orange Corners programme is organised as a combined incubator and accelerator programme where the business stages of the participating firms differ per country. In most countries the programme is aiming at entrepreneurs relatively early in their entrepreneurial journey, while in some countries (e.g. in Ghana) the programme is focused on more experienced entrepreneurs. This is in line with the results that most respondents do not have very much business ownership experience. However, we also see respondents with (expert) experience. From the case studies we know that some of the alumni were active in the industry before starting their own business.

In the survey we asked respondents what skills they had acquired or strengthened during the Orange Corners training programme. We divided these skills into three themes: ideas and opportunities, resources and into action. Respondents were able to tick multiple skills within each theme. Notably, on average the respondents answered that for 10 out of 15 skills they either acquired or strengthened them during the Orange Corners programme. Figure 5 shows that respondents indicate that Orange Corners has taught them skills in all these three categories. The three skills that stand out are 'Using my imagination and abilities to identify opportunities for creating value' with 81% of respondents saying that they acquired or strengthened this skill because of OC, 'Believing in myself and keep developing' (76%) and 'Decision making, thus dealing with uncertainty, ambiguity and risk' (71%). These skills are also mentioned in the interviews, as reported in the next section.



Figure 5. Acquired and strengthened skills during the Orange Corners training programme (n=159).
Source: Dialogic survey

4.1.3 Interviews

Many of the entrepreneurs that we interviewed in the five case study hubs, perceived positive effects of the Orange Corners programme on their personal development (in the period 2021-2024). They often mentioned that the Orange Corners programme has improved their self-confidence and entrepreneurial competences. With respect to the latter, in particular the improvement of financial literacy, general management skills, opportunity recognition, and market development skills were recognised.

I gained confidence and clarity about my business, including where I want to be in 2, 5, and 10 years. (entrepreneur S2)

Without Orange Corners I would not have the clarity I have today: the coherence of my vision has increased. We now know better how to develop an impactful business. (entrepreneur N3)

I especially learned from the sessions on finance and accounting. Learned as much as in a business school. (entrepreneur N4)

Through the program, I also acquired several soft skills, including entrepreneurship, customer retention, and financial management. I applied what I learned to my business in areas such as marketing, branding, and financial management. Mentorship was a source of inspiration for me. I gained valuable insights from both mentors and fellow entrepreneurs, which had a good impact on my growth. (entrepreneur S3)

I learned a lot on budget planning, the finances helped a lot as well; general business knowledge too. (entrepreneur I2)

Like many startups, I struggled with finance, and Orange Corners helped me learn more about managing finance. (entrepreneur I4)

And not just for the business with which they participated, but also for follow-on businesses:

Orange Corners laid the foundation for my entrepreneurial journey. (entrepreneur N5)

The coaching in the Orange Corners programme opened my eyes to the broader world of business. These new perspectives have helped me create four new businesses while also experiencing growth in my primary business. (entrepreneur S4)

In addition, participation also often increased their aspirations, due to support of Orange Corners and exposure to role models, peers and mentors of the Orange Corners programme. Some even stated that their self-confidence had greatly increased, also having positive effects on other parts of their life (e.g. education and follow-on jobs).

The programme boosted my confidence and developed my entrepreneurial skills. It gave me clarity, ambition, and the belief in my potential to succeed. (entrepreneur S4)

I would never have imagined myself doing something big for society before. (entrepreneur E6)

Orange Corners gave me exposure to role models and motivated me to apply for a master's degree. (entrepreneur E4)

4.2 Income created

In this section we will answer the question: *What income have Orange Corners and OCIF participants been able to create (for themselves) since participating in the programme?* **We see that for the majority of Orange Corners-only participants their business is not their main source of income, while for the majority of OCIF participants the business is their main source of income.**

4.2.1 Portfolio

In the Programme survey a question was asked if this was the main source of income. For approximately 40% of respondents this was the case. There are no significant differences between men and women. We also have data on the hours spend in the company. Most respondents (about 40%) spend 30 hours or more per week in their businesses. Men have a significant higher score (almost 50%) than women (almost 30%).⁴⁹

4.2.2 Follow-up survey

In our survey we also asked participants whether their Orange Corners business is their main source of income. In our survey this percentage is slightly higher than in the Programme survey (50% instead of 40%).⁵⁰ For men the Orange Corners business is more often their

⁴⁹ It should be noted that in its early phase OCIF offered programs that might be considered as pre-incubation. Since then, the focus shifted to incubation, post-incubation and acceleration in many countries. Therefore, it could be the case that figures above increase over time.

⁵⁰ The cause of this small deviation probably stems from selection effects.

main source of income (54%) than for women (45%). Table 7 below furthermore shows that for entrepreneurs that received OCIF funding, the Orange Corners business is more likely to be their main source of income (66% for all OCIF track combined).

Table 7. Percentage of respondents for which their Orange Corners business is their main source of income per track (n=129). Source: Dialogic survey

Track	N	% Main income
Only Orange Corners	67	36%
Orange Corners + OCIF Track I	42	57%
Orange Corners + OCIF Track II	10	80%
Orange Corners + OCIF Track I + Track II	10	90%
Grand Total	129	50%

4.3 Unintended effects

In this section we will answer the question: *What are possible wider unintended effects of the Orange Corners/OCIF programmes on the personal development of the alumni (positive and negative)? What examples do alumni have in this context?* **Several unintended effects were identified: (1) a quit large group of alumni keep in touch with the people they met through Orange Corners (2), almost two third (!) of the participants founded additional (successful) businesses.**

4.3.1 Portfolio

The RVO-survey asked to which extent participants are still in contact with the people they have met through the programme. We see very positive outcomes, see Table 8.

Table 8. Unintended effects of the Orange Corners programme. Source: Programme survey

Question	strongly disagree	disagree	neutral	agrees	strongly agree
I am still in touch with some people I met through Orange Corners.	4%	5%	19%	34%	37%

4.3.2 Follow-up survey

Besides their Orange Corners business, respondents of the survey also founded additional businesses. In total 144 additional businesses were founded by a group of 156 respondents; 64% of respondents founded an additional business.⁵¹ Of these additional businesses, 73% (105) are currently still operating. This can be interpreted both positively and negatively.⁵²

⁵¹ Please note that this may include firms that may have been created before, during or after participating in the incubation and acceleration programmes. This also implies that some of the additional founded businesses may have been created before participating in the incubation and acceleration programmes and do not longer exist.

⁵² Rosa (2019: 138) also shows this in Uganda: "A majority of poor Ugandans, need to diversify their enterprise portfolios as no single one is sufficient to make a basic living. For a sizeable minority,

Positive is that entrepreneurs that participated in the OC incubation and acceleration programmes feel confident to create additional businesses next to business with which they participated in Orange Corners. Interpreted more negatively one could equally argue that this portfolio entrepreneurship is not necessarily a free choice, but most likely the result of the original business not generating enough income (as mentioned in the case study interviews). However, it is most likely that the knowledge gained in the OC programmes in which the entrepreneurs participated is spread more widely than the firm with which they participated in Orange Corners.

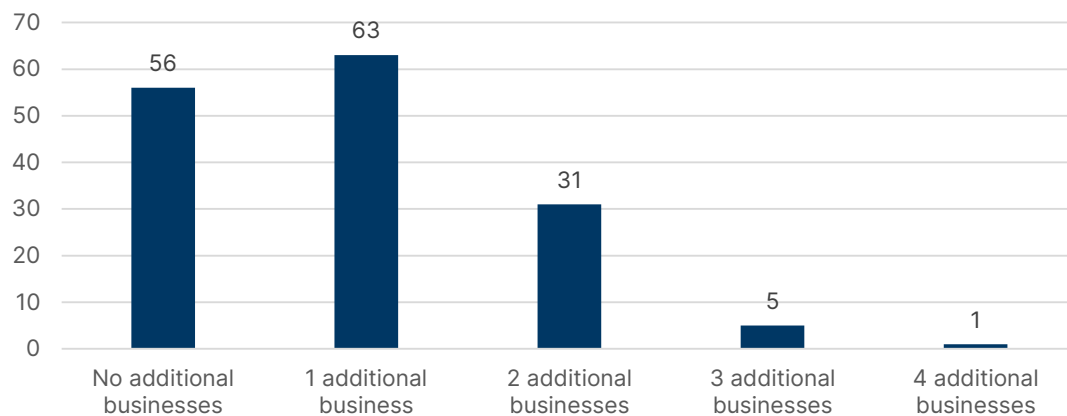


Figure 6. The number of businesses Orange Corners/OCIF participants have founded aside from the business with which they participated in Orange Corners (n=156). Source: Dialogic survey

There is a high level of variety between Orange Corners regions. Because of the small number in certain regions, we cannot draw conclusions from this, but in the regions of Morocco, Iraq, Ghana and Angola 50% or less of the respondents started an additional business. In the other regions over half stated they founded a business in addition to their Orange Corners business.

however, portfolio entrepreneurship is not just a means to survive but is an entrepreneurial growth strategy.” Rosa, P. (2019). Entrepreneurial growth through portfolio entrepreneurship: The entrepreneurial career ladder. The family business group phenomenon: Emergence and complexities, 111-144.

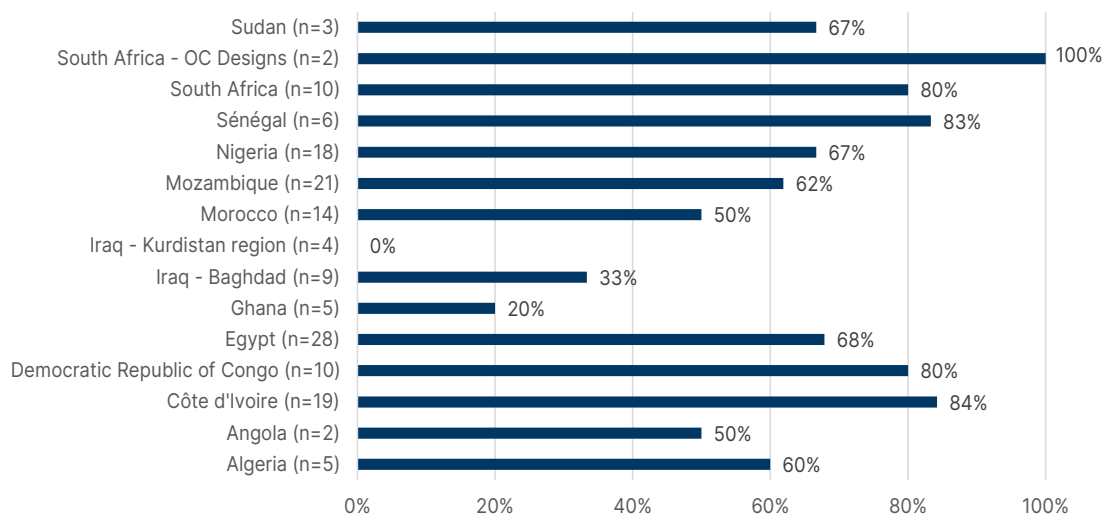


Figure 7. Percentage of respondents that indicate to have founded another business per region (n=156).
Source: Dialogic survey.

4.3.3 Interviews

The most often observed unintended effects in the interviews were the start of follow-on businesses (even in the short time of less than 3 years after participation in Orange Corners) and the development of a network or entrepreneurial community by the Orange Corners alumni (especially in Nigeria).

Orange Corners is different than other programs, because there is a conscious effort for you to grow during and after the program. I'm part of a community that continues. Besides the training, networking, life-long relationships for learning and businesses have been developed. (entrepreneur N2)

We have collaboration with many entrepreneurs in other cohorts: an alumni community has been built. (entrepreneur N3)

The learnings from Orange Corners led to some cases in which the entrepreneur decided not to (actively) continue with the initial business but start other more promising ventures. The learning communities were often formed by members of one cohort, but sometimes also involved entrepreneurs from multiple cohorts. Many of the participants value becoming part of a like-minded network, or even an entrepreneurial community.

I have built up my network and I'm part of a community that helps with solving business problems. (entrepreneur N1)

Another unintended, but very welcome effect from the Orange Corners/OCIF-perspective is revealed in the interviews is that many entrepreneurs were "paying forward" to the entrepreneurial ecosystem: they acted as mentor, they sit in panels and sometimes become a trainer for a next generation of entrepreneurs in their region.

5 Business development

This chapter revolves around business development. The main research question is: *How did businesses of entrepreneurs develop 3 years after following the Orange Corners programme and OCIF Tr. I, and 1 year after receiving OCIF Tr. II support, and what was the role of these programmes herein?* This breaks down in eight specific questions.

1. How many entrepreneurs remain in business after 3 years? Is there a difference between the three subgroups discerned (Orange Corners only, Orange Corners + OCIF Tr. 1, Orange Corners + OCIF Tr. 1+2)?
2. What business stage are (surviving) businesses that were supported through Orange Corners/OCIF in? Is there a difference between the three subgroups discerned (Orange Corners only, Orange Corners + OCIF Tr. 1, Orange Corners + OCIF Tr. 1+2)?
3. What are the most significant changes these businesses have undergone in terms of: revenue growth, job creation, scaling opportunities (markets, products, locations), external financing and expansion of networks (clients, business partners, etc.)?
4. To what extent does OCIF catalyse and/or extend these effects of the Orange Corners training programme on the businesses of alumni? Is there a difference between the three subgroups discerned (Orange Corners only, Orange Corners + OCIF Tr. 1, Orange Corners + OCIF Tr. 1+2)?
5. What types of jobs and income have Orange Corners and OCIF participants (as firms) been able to create since participating in the programme?
6. To what extent are alumni implementing strategies learned in Orange Corners and OCIF to ensure sustainability of their businesses?
7. What are signs that Orange Corners and OCIF enabled young entrepreneurs to tackle local challenges?
8. What are possible wider unintended effects of the Orange Corners/OCIF programmes on business development (positive & negative) of alumni and the wider community? What examples do alumni have?

We will also address research question 2: *To what extent do effects of participation in Orange Corners/OCIF vary in terms of location, sector, business stage, political context and gender?*

5.1 Business survival

In this section we will answer the question: *How many entrepreneurs remain in business after 3 years? Is there a difference between the three subgroups discerned (Orange Corners only, Orange Corners + OCIF Tr. 1, Orange Corners + OCIF Tr. 1+2)?* **At this moment, over 80% of the businesses still exist. For participants backed by OCIF, this is even over 90%.**

5.1.1 Survey

Table 9 shows that 81% of the businesses with which respondents to our survey participated in the Orange Corners/OCIF programme are still active. This is higher than the “global average” of 60-70% surviving after three years.⁵³ The degree to which this high survival rate is

⁵³ For example, in the US over 35% of the companies fail in three years (<https://www.lendingtree.com/business/small/failure-rate/>), and the five-year survival rate in the EU is about 45% (https://ec.europa.eu/eurostat/cache/htmlpub/key_figures_on_european_business_2021/business_dynamics.html)

explained by selection or treatment effects cannot be discerned in this study. However, it is likely that respondents with a successful business are more likely to complete our questionnaire.

Table 9. Business status of businesses or business ideas with which participants participated in Orange Corners/OCIF in 2021 (n=159). Source: Dialogic survey

Business status	N	%
No, the business does no longer exist.	29	18%
Yes, but the business is no longer mine.	1	1%
Yes, it still exists, and I have other businesses as well.	48	30%
Yes, this is my main business still.	81	51%

Most of the businesses are not yet financially viable after 3 years, as they do not have multiple paying customers and are not yet profitable (see Table 10 and Table 30). This means that many of the businesses have not yet taken off, and entrepreneurs get their income from other businesses or occupations (see Table 9 and Figure 8).

Figure 8 shows the outcomes per subgroup. The difference between Orange Corners only and a combination of Orange Corners and OCIF is substantial. Businesses of respondents that have participated in Orange Corners and received funding through OCIF (Track I and II) have the highest survival rate. This is a predictable outcome since these respondents have received funding. This could also partially be explained by the thorough selection of entrepreneurs that receive Track II funding. Presumably the most talented entrepreneurs with the best business ideas receive funding in Track II, while the less promising entrepreneurs only participate in Orange Corners and receive Track I funding.

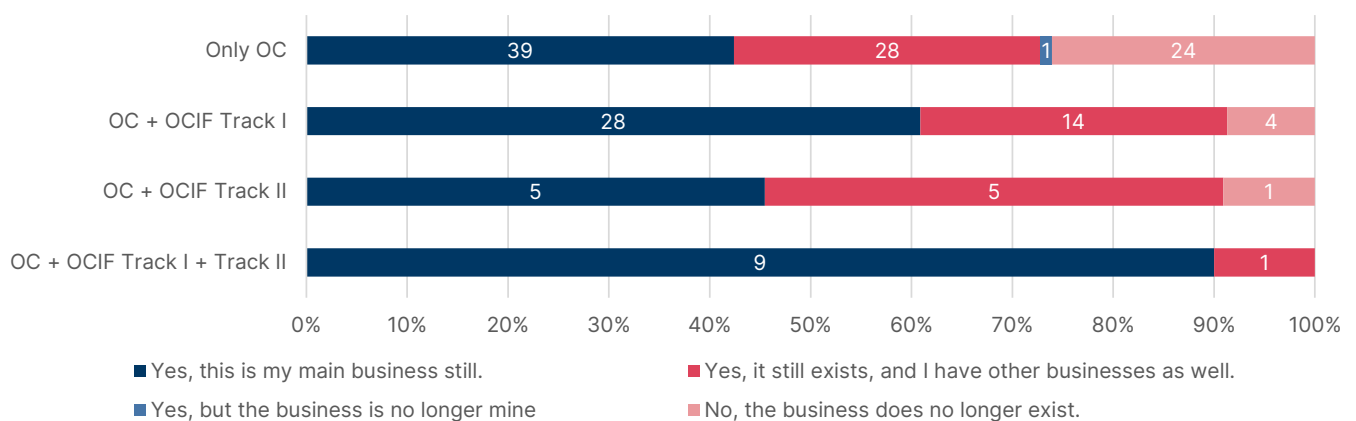


Figure 8. Business survival of businesses or business ideas with which participants participated in Orange Corners/OCIF in 2021 per track (n=159). Source: Dialogic survey

5.1.2 Interviews

Many interviewed entrepreneurs stated that the Orange Corners programme was very important for developing and changing the business model of their venture, and for financial management. Without these two essential inputs of the Orange Corners programme, their venture was much less likely to have survived or even have taken off.

I would have struggled much longer without the Orange Corners programme. The Orange Corners programme was a life changer: it accelerated the pivot of the business model. (entrepreneur N4)

Egypt went through so many crises (Covid, devaluation), without the business model change by Orange Corners, the business would not have survived through these crises. (entrepreneur E5)

When I enrolled at the Orange Corners programme I was at a point when I always stopped with everything: I had no space, there was Covid, I only had my house as business space. (entrepreneur N2)

Orange Corners carries their participants, referrals, put them forward for opportunities. Orange Corners came at a moment, when I almost would throw myself off the bridge. After Covid, I got kicked out of former site, due to unclear government policy. They give books on key business learnings: deliberate, you are prepared, you learn how to spend the money effectively. You are equipped to get the funding, and not all at once, but in tranches, with targets, step by step. (entrepreneur N2)

5.2 Business stage of surviving businesses

In this section we will answer the question: *What business stage are (surviving) businesses that were supported through Orange Corners/OCIF in? Is there a difference between the three subgroups discerned (Orange Corners only, Orange Corners + OCIF Tr. 1, Orange Corners + OCIF Tr. 1+2)?* **Overall, we see that one year after graduation, almost 50% have paying customers and almost 20% is a profitable company. Approximately 60% of the companies with OCIF support have already developed products for multiple customer segments, while for companies with Orange Corners support only, this figure is much lower (33%)**

5.2.1 Portfolio

By using the portfolio data, we were able to construct a maturity index, see

Table 10 and Figure 9.⁵⁴ The data shows that the maturity of companies increases over time. For example, in the pre-programme group we see that 41% has a product on the market, while after graduation this increases to 53%. Remarkably, we see a specific maturity pattern for business a year after graduation. The number of businesses with an *unknown* stage increases substantially, which is an indication of unsuccessful enterprises. The number of businesses that is profitable only slightly increases during and after graduation. The share of businesses that is financially viable, with many paying customers and/or making a profit, does not increase over time. Yet here we should note that the number of observations decreases from 319 pre-programme to 235 on graduation and just 67 a year after.

⁵⁴ For the sake of clarity, we use cumulative figures. For example, for the pre-programme it means that 25% of the businesses are in stage 7 or higher. If we want to know the exact percentage of businesses in stage 7, we need to subtract this number by the score for stage 8 (15%) and this ends up with 10%.

Table 10. Maturity of businesses (source: Programme survey). Note that the numbers indicates the participants who are in a specific stage or a higher stage.

Business stage reached	Pre-programme (N=319)	Graduation (N=235)	Year after (N=67)
Unknown	20%	7%	22%
Stage 1: An idea with concrete plans to start	80%	93%	78%
Stage 2: Validation/Minimum Viable Product	67%	81%	64%
Stage 3: Prototype has been built	59%	80%	63%
Stage 4: Business officially registered	47%	65%	51%
Stage 5: Business has product on the market	41%	53%	46%
Stage 6: Business has first paying customers	36%	49%	42%
Stage 7: Business has many paying customers	25%	29%	25%
Stage 8: Business is making profit	15%	17%	19%

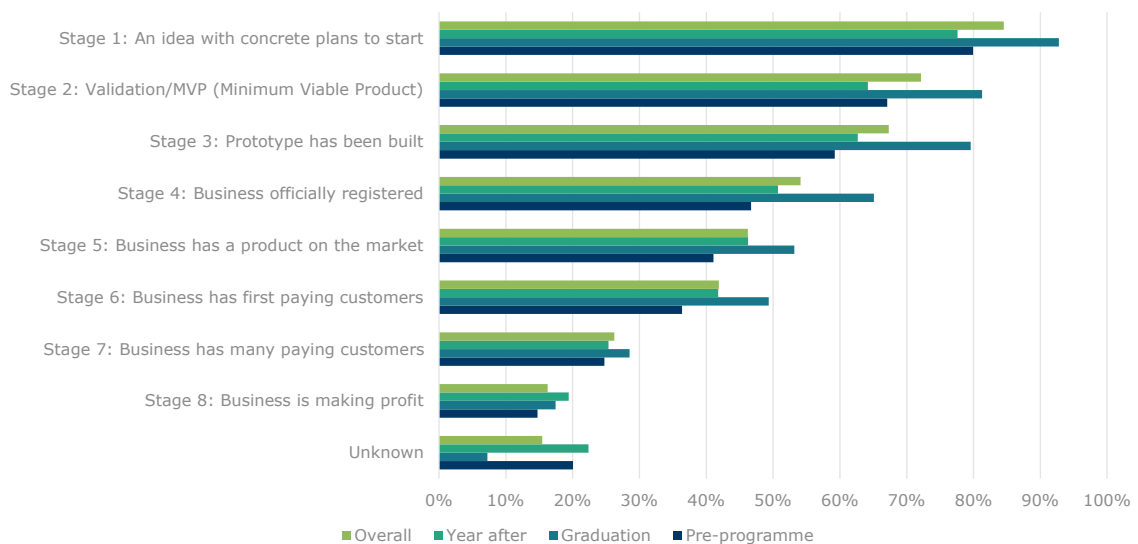


Figure 9. Maturity of businesses (source: Programme survey). Note that the share indicates the participants who are in a specific stage or a higher stage, i.e. cumulative.

5.2.2 Follow-up survey

A total of 129 respondents indicated that their business still exists and is in their hands and they were asked about the current phase of their business' product development. 118 respondents answered the question, and the results are shown in

Table 11. Most businesses were in the final phase and had developed a product for multiple customer segments (33%), and a substantial part (15%) had scaled up their production, which is in line with the outcome from the portfolio data (business stages 7 and 8). A quarter of the businesses are testing their product with paying customer(s) and 19% are still developing it. This distribution is seen amongst all subgroups, except for the seven businesses from respondents Orange Corners + OCIF Track II, where 60% of businesses have already developed products for multiple customer segments.

Table 11. Current product development phase (n=118). Source: Dialogic survey

Current product development phase	
Developed product	19%
Tested product with paying customer(s)	25%
Scaled up production	15%
Developed product for multiple customer segments	33%
Don't know	8%

Besides the product development phase, we also asked respondents about the customer development phase. 69% of respondents have already sold goods/services to multiple paying customers and/or are scaling to mass market. This percentage is highest in respondents that have received Track II funding (see Figure 10). This is much higher than the 40+% of the businesses in prior phases in business stage 7 and 8 (see Table 10). However, it should be considered that the least successful ventures are likely to have exited the sample or have not responded to the survey.

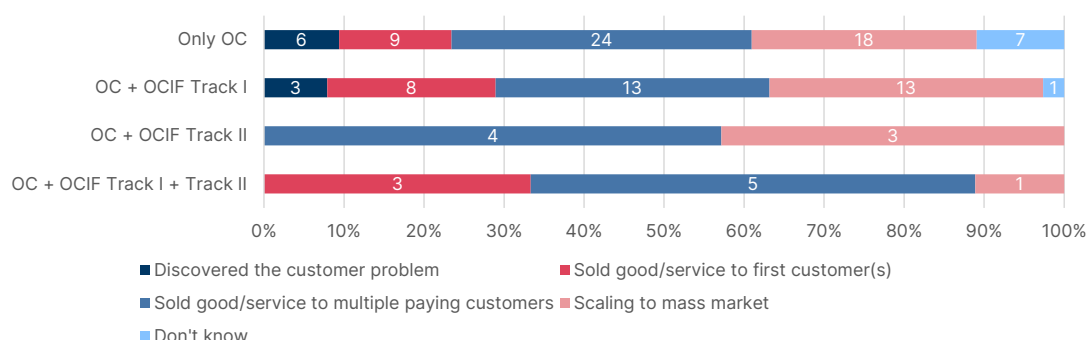


Figure 10. Current customer phase per track (n=118). Source: Dialogic survey

5.2.3 Interviews

Most entrepreneurs mention that the support of Orange Corners greatly enhanced the development of their business. They especially mention the improved strategy, finance, marketing, operations and overall business model due to Orange Corners. For many it helped to develop their business:

Orange Corners helped implement my ideas and develop business models. (entrepreneur N5)

Orange Corners helped with product development, pitching, business development. (entrepreneur S1)

The programme provided essential skills that have contributed to the growth of my business. While I already had ideas and skills, the Orange Corners programme helped me learn how to monetize those ideas. I also gained valuable knowledge on setting competitive pricing and attracting clients from digital platforms to shop with us. (entrepreneur S2)

Orange Corners did not change the business model, but it helped to accelerate the business. (entrepreneur M3)

Orange Corners accelerated the development from MVP to market launch. (entrepreneur E4)

Orange Corners gave me the basics of starting and building up a firm. (entrepreneur M5)

Orange Corners helped to develop a different business model and expand marketing. (entrepreneur E2)

Orange Corners has supported me in financial management, in developing the business model, and to deal with personnel better. (entrepreneur E3)

The mentorship very helpful, gave information to overcome challenges of starting up business. (entrepreneur E4)

For a substantial part of the participants the Orange Corners program was very important:

Orange Corners had a huge role in the development of my business: it gave access to many trainers, and guidance directly, and indirectly: new business ideas, networking. This enabled the business to go to market, and to further develop its product. (entrepreneur E1)

Orange Corners was key. Just after covid, it was a very tough period. The coaching for business planning and strategy, was especially good for a scientist like me. The Orange Corners programme made our business investment ready. (entrepreneur M3)

Orange Corners helped a lot: via mentoring, mentorship also continued afterwards (with vast knowledge of agrifood), and FATE foundation learnings every week. (entrepreneur N3)

The Orange Corners programme played a major and decisive role in achieving our growth objectives and quality management system. (entrepreneur S5)

For some participants the Orange Corners program was not just important, but even transformational:

The Orange Corners programme was a turning point for my business. It changed the business model, and it was very important for finding good business partnerships (also via Orange Corners mentor). (entrepreneur E5)

Orange Corners inspired me, and my business idea transformed completely. It helped with networking to other entrepreneurs and businesses. (entrepreneur E6)

The programme was a life changer for me. It led to a better organisational structure. We would not have achieved the growth without Orange Corners. We learned about scaling our business and pitching the business. (entrepreneur N1)

5.3 Economic development of businesses

In this section we will answer the question: *What are the most significant changes these businesses have undergone in terms of: revenue growth, job creation, scaling opportunities (markets, products, locations), external financing and expansion of networks (clients, business partners, etc.)?* **About 80% of the participants perceived the Orange Corners network to have been helpful in growing their businesses. Over time, we see a steady increase of the turnover by businesses of Orange Corners alumni. More importantly, we also see profit rates of the businesses increasing. Moreover, we see that some Orange Corners supported businesses focus on innovative products. It**

can also be concluded that more mature business, embark in more mature ways when financed.

5.3.1 Portfolio

One of the most important questions in the Programme survey is to which extent Orange Corners has been helpful in growing the businesses of participants. Table 12 shows that respondents are very positive about this topic.

Table 12. Economic effects of the Orange Corners programme. Source: Programme survey

Question	strongly disagree	disagree	neutral	agree	strongly agree
The Orange Corners network has been helpful in growing my business	5%	5%	19%	30%	40%

From the Programme survey we can derive that about 10% of the business operate internationally. However, another 60% of the businesses have the ambition to do this. When asked about competition, we see that 45% of the businesses have both local and international competitors.

The survey also asked respondents if customers consider their product as new. This is an indication for innovation. Over 20% of respondents have indicated that all customers find their product completely new for the market and almost 50% have indicated that some customers find their product innovative. The survey also asked the respondents if they find their product innovative. Over 80% of the respondents find their product (somewhat) innovative, and only a small proportion of the respondents (6%) do not find their product innovative.

Another way of looking at business development is by analysing sources of finance. The Programme survey shows that about two thirds of the entrepreneurs put their own money in the company, with men scoring significantly higher than women (72% vs 58%).

Table 13 shows an overview of data on external sources of financing. It shows that finance for these businesses primarily come from family or friends. Mostly financing is obtained through loans from family and friends but shifting to loans from banks, and subsidies or grants as participants graduate. Obviously, most financing takes place in the early stages. It can also be found that the source of financing becomes more advanced and professional in later stages. We see more corporate investment funds and banks and less families and friends.

Table 13. Distribution of source of financing, all regions (Source: Programme survey)

Source of financing	Pre-programme	Graduation	Year after
Commercial bank/institute	6%	1%	8%
Micro-credit bank/institute	1%	3%	8%
Government	6%	4%	17%
International organisation	10%	15%	0%
National organisation	15%	19%	8%
Venture capitalist	1%	4%	0%
Angel investor	6%	8%	8%
Corporate investment funds	1%	3%	8%
Family and/or friends	53%	43%	42%

From the data we were also able to derive the type of finance. Equity, grants and subsidies increases over time, loans decrease (see Table 14). This is rather surprising, given that a fair amount of the graduates has received an OCIF, often including a loan component.

Table 14. Distribution of type of financing, all regions

	Pre-programme	Graduation	Year after
A loan	50%	29%	20%
A grant or subsidy	35%	56%	60%
An investment for equity	15%	12%	20%
Other (financing type)	0%	3%	0%
	100%	100%	100%

In the Programme survey respondents were asked if they have created any partnerships with partner companies of the Orange Corners programme in the past six months. Only a small portion of the respondents (8%) did this. The respondents were presented the same question, but than for other incubates from the Orange Corners programme. These outcomes were slightly higher (12%), but still quite low.

5.3.2 Follow-up survey

We asked respondents of the survey whose businesses were currently still existing (n = 129) how much revenue their business made each year. The table below shows that the number of businesses creating revenue increases each year (with 57 in 2020 and 90 in 2023). When we look at the mean revenue of these businesses, we see a clear jump in revenue from 2021 to 2022. This jump seems to be caused by some outliers, therefore we also show the median revenue, which is not sensitive to these outliers. Therein we observe a steady increase in revenue over the years.

Table 15. Number of Orange Corners businesses that generated revenue each year and the mean revenue those businesses generated (n=129). Source: Dialogic survey.

	2020	2021	2022	2023
N	57	75	89	90
Mean revenue	€ 45.572,50	€ 42.752,16	€ 243.215,28	€ 215.103,36
Median revenue	€ 1.200,00	€ 2.844,00	€ 5.593,80	€ 9.046,00

When we combine all business (also the ones that do not generate revenue) Table 16 shows that entrepreneurs that have gone through Orange Corners training and receive Track I and Track II OCIF funding create businesses with the highest revenue in the medium term (2023). However,

Table 17 shows that entrepreneurs who have completed the Orange Corners training and received Track II funding show the highest median revenue generated throughout 2020 until 2023. This shows that *some* of the entrepreneurs who have only participated in the Orange Corners training, or who received Track I and Track II as well can be considered outliers as they generated a lot of revenue.

Table 16. Mean revenue generated per year, per track (n=129). Source: Dialogic survey

Track	2020	2021	2022	2023
Only Orange Corners (n = 42)	€ 39.022,20	€ 44.842,93	€ 282.016,66 ⁵⁵	€ 48.468,43
Orange Corners + OCIF Track I (n=10)	€ 9.611,69	€ 12.297,69	€ 21.074,30	€ 26.383,20
Orange Corners + OCIF Track II (n=10)	€ 4.648,68	€ 8.464,85	€ 28.946,42	€ 38.156,25
Orange Corners + OCIF Track I + Track II (n=67)	€ 6.011,02	€ 26.749,89	€ 617.743,45	€ 1.936.590,00
Mean	€ 24.739,36	€ 30.537,25	€ 206.153,90	€ 184.374,30

⁵⁵ One respondent in this category indicated the revenue for this year €15 million, whereas it was around €1.5 million in 2021 and 2023. We suspect that this is a typo. The correct mean therefore lies much lower. If we would delete the data for this respondent for all years, the mean for all years would be around € 12.000-13.000 for all years.

Table 17. Median revenue generated per year, per track (n=129). Source: Dialogic survey

Median	2020	2021	2022	2023
Only Orange Corners (n = 42)	€ 65,70	€ 483,00	€ 1.145,14	€ 2.145,00
Orange Corners + OCIF Track I (n=10)	€ 0,00	€ 2.400,00	€ 7.500,00	€ 10.200,00
Orange Corners + OCIF Track II (n=10)	€ 1.028,55	€ 7.296,25	€ 21.052,50	€ 19.725,45
Orange Corners + OCIF Track I + Track II (n=67)	€ 0,48	€ 2.294,25	€ 10.144,00	€ 11.875,00
Median	€ 18,55	€ 1.055,40	€ 3.889,45	€ 5.245,49

Surviving businesses (n = 118) were also asked the profit rate per year of their Orange Corners business. We saw earlier in section 4.2.2 that surviving business saw an increase of almost 600% in mean revenue between 2021 and 2022. Figure 11 below shows that these businesses also saw an increased profit. Over the years, the amount of businesses with a negative profit rate decreased and the amount of businesses with a positive profit rate of more than 10% increased from 14% in 2020 to 61% in 2023. We do not observe substantial differences between the different subgroups.

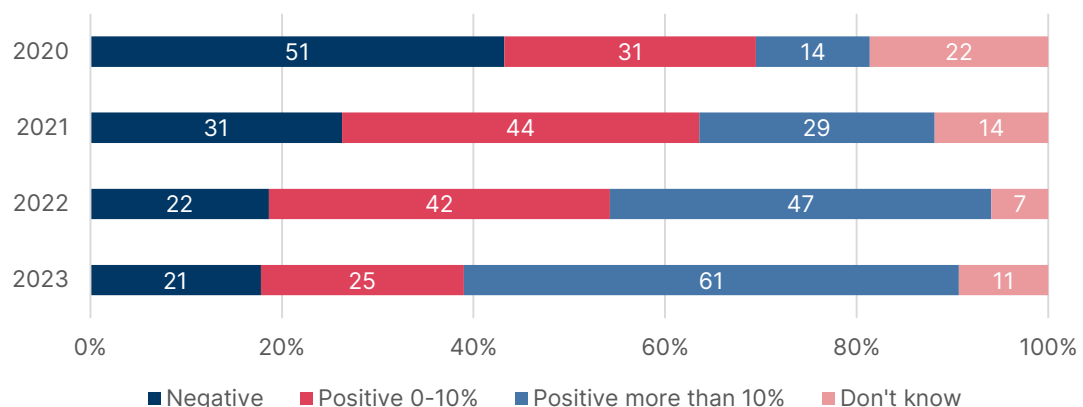


Figure 11. Profit rate per year (n=118). Source: Dialogic survey

When asked about the extent to which Orange Corners/OCIF helped to generate more profit on a scale from 0-5, respondents were more positive about contribution of the programme to generating revenue (mean score of 3,36) than to generating profit (mean score of 2,84). When asked how the programme helped to generate revenue, respondents answer that they value the trainings, workshops and masterclasses that helped to formalize a business model. Moreover, the financial resources served as seed capital to start the business. Concerning generating profit, the respondents indicate that the programme helped in optimising costs and in reaching customers.

Access to international networks is an important aspect for the continued growth of the businesses in the Orange Corners programmes. The Programme survey showed that about 10% of the business operate internationally. The Dialogic survey showed that about 20% of

Orange Corners businesses operate internationally. Here we do not see a substantial difference between the subgroups of Orange Corners and OCIF. The difference is mainly seen between the different Orange Corners countries. In some countries (including Algeria, Congo and Sudan) none of the businesses operate internationally, whereas for other countries (including Ghana and Morocco) this is 50% or more. From the interviews we know that this is the result of specific choices made by the local hub.

5.3.3 Interviews

We asked the entrepreneurs what would have happened to their business without the Orange Corners programme. Many entrepreneurs responded that without Orange Corners their business would have grown much slower.

Without Orange Corners we would have continued on the same path as before, but it would have taken longer. (entrepreneur N3)

It would have taken much more time to grow the business without Orange Corners. (entrepreneur M4)

Without Orange Corners the business would still be in ideation or prototyping phase. It would only be selling to family and friends. (entrepreneur E2)

Without Orange Corners the business would not have developed as fast, or not at all. There have been so many challenges, but with the Orange Corners programme I learned how to deal with these challenges in a sustainable way. (entrepreneur E3)

Without Orange Corners I wouldn't be where I am today, growth would be much slower. It would have taken me 10 years to achieve what I've been able to accomplish in 3 years. (entrepreneur N1)

Without Orange Corners I would have continued the business, but I can tell that progress would have been much slower. It would have taken me more time and involved more mistakes to achieve growth. (entrepreneur S2)

Without Orange Corners it would have taken me much longer to reach where I am today without the programme. It has positively impacted my business by helping me identify and seize opportunities. (entrepreneur S4)

Without the Orange Corners programme the business would not have grown it evolved for several years without a structured segmentation of our customers, a mapping of our positioning and an initial structuring of our finances through stock management, which caused the company to have difficulty taking off and getting its head out of the water. (entrepreneur S5)

In addition, some entrepreneurs mentioned that participation in the Orange Corners programme led to follow-up funding.

Orange Corners has been a big push for us, for both market development and to get the first equity investors. (entrepreneur M2)

Our initial research design included interviews with at least six entrepreneurs that participated in the Orange Corners/OCIF program, and a control group of six entrepreneurs that were selected in the bootcamp (of the Orange Corners programme) but were not selected for the full Orange Corners programme, per hub. This proved to be impossible to realize in practice, but we got closest to this initial research design in Nigeria. In Nigeria we could interview 5 entrepreneurs that participated in the Orange Corners programme and 4

entrepreneurs that participated in the bootcamp only (not selected in the Orange Corners main program). The findings from this small sample are indicative and not representative for the whole population of entrepreneurs that participated in the bootcamp only, and the population that participated both in the bootcamp and the full Orange Corners programme.

There are striking differences between these two groups of Nigerian entrepreneurs. First, Orange Corners participant-firms are on average larger at the start of the Orange Corners programme in 2021 (4.90 FTE in comparison to 1.6 FTE of the Bootcamp-only firms). So, Orange Corners seems to select larger, more promising firms. Second, the Orange Corners participant-firms grow to a larger size in two years (10.25 FTE in comparison to 4.63 FTE of the Bootcamp-only firms). In absolute terms the Orange Corners firms grow much more, but in relative terms they grow somewhat less (2.09 multiplier versus 2.74 of the Bootcamp-only firms). So, in absolute terms there seems to be a sizeable positive treatment effect of the Orange Corners program, but not in relative terms. Third, there is substantial heterogeneity within the two samples. Both samples have very successful firms and unsuccessful firms (that discontinue or have very low turnover after two years). This is also reflected in the huge variety in the labour productivity of the firms (turnover per fte). Fourth, the Orange Corners participant-firms are on average much more productive than the Bootcamp-only firms (1145 euros per fte per year, versus 3518 euros per fte per year of the Orange Corners participant-firms). The data of this comparative analysis can be found in Table 42 in Appendix 2.

5.4 Effect of OCIF on the effectiveness of Orange Corners training

In this section we will answer the question: *To what extent does OCIF catalyse and/or extend these effects of the Orange Corners training programme on the businesses of alumni? Is there a difference between the three subgroups discerned (Orange Corners only, Orange Corners + OCIF Tr. 1, Orange Corners + OCIF Tr. 1+2)?* **It seems that businesses with OCIF (compared to Orange Corners only) have (1) a higher survival rate (2) are in further phases of product and customer development (3) have much higher revenues.**

5.4.1 Follow-up survey

In the previous sections we saw differences on outcome measures between entrepreneurs that only followed the Orange Corners training programme and entrepreneurs that received Orange Corners funding in addition. Here we repeat some of these findings:

- Businesses that have received OCIF funding have a higher survival rate (5.1.1).
- Businesses that have received OCIF Track II funding are in further phases of product and customer development (5.2.2).
- Businesses that have received Track I and Track II funding have a (much) higher revenue than businesses with Orange Corners only or Orange Corners + OCIF Track I (5.3.2).

5.4.2 Interviews

We asked the entrepreneurs what the role had been of OCIF track I. They most often mentioned that track I helped to develop the prototype and the ultimate product, in little steps.

We also asked whether the entrepreneurs would have joined the Orange Corners programme without the monthly allowance (which is part of OCIF track I). Most entrepreneurs would have joined the Orange Corners programme without the monthly allowance of OCIF track I.

Many of them were not aware of OCIF track I funding when they started the Orange Corners programme. However, they often used it as “pocket money” for making small investments and to cover small costs (e.g. travelling to the training site). Several interview partners mentioned that it can be seen as a commitment fee, increasing the involvement (presence) of entrepreneurs in the Orange Corners programme modules.

OCIF track II has been very important for the development and growth of the businesses. They could invest in machines and staff, and expand into other regions and countries

The Orange Corners programme came exactly at the right time. I had no money, without the Orange Corners Innovation Fund I could not have accelerated so quickly. (entrepreneur N2)

Without Orange Corners it would have been complicated, more difficult to access finance (especially OCIF), and the business would have grown much slower. (entrepreneur S1)

For many, also those that did not win OCIF track II, the possibility of winning OCIF track II was an important reason to join Orange Corners in the first place. In that sense, the possibility of acquiring OCIF track II funding seems to attract more ambitious entrepreneurs.

5.5 Economic effects of Orange Corners/OCIF business

In this section we will answer the question: *What types of jobs and income have Orange Corners and OCIF participants (as firms) been able to create since participating in the programme?* The answer to this question is: **The number of full-time jobs Orange Corners and OCIF alumni from 2021⁵⁶ (as reported by the 118 respondents that responded in the Dialogic survey) have created has grown from over 200 in 2020 to 700 full time jobs in 2024. Over 50% of these jobs are conducted by women.**

5.5.1 Portfolio

Out of all the business, 45% have paid employees and about 45% do not have paid employees.⁵⁷ Here we find no distinct differences between male and female entrepreneurs. We also have very specific data on the number of full-time employees and the gender of both the entrepreneur and these employees. Figure 12 shows that female entrepreneurs hire slightly more women than male entrepreneurs. Male entrepreneurs hire more male employees.

⁵⁶ The impact of the total population of not only all entrepreneurs participating in 2021, but also from entrepreneurs that participated in earlier or later years in the OC and OCIF programmes is evidently larger but cannot be assessed based on the datasets available.

⁵⁷ About 5% of the respondents didn't answer the question. Another 5% gives answers that indicate that they work with freelancers, volunteers or people on a commission base.

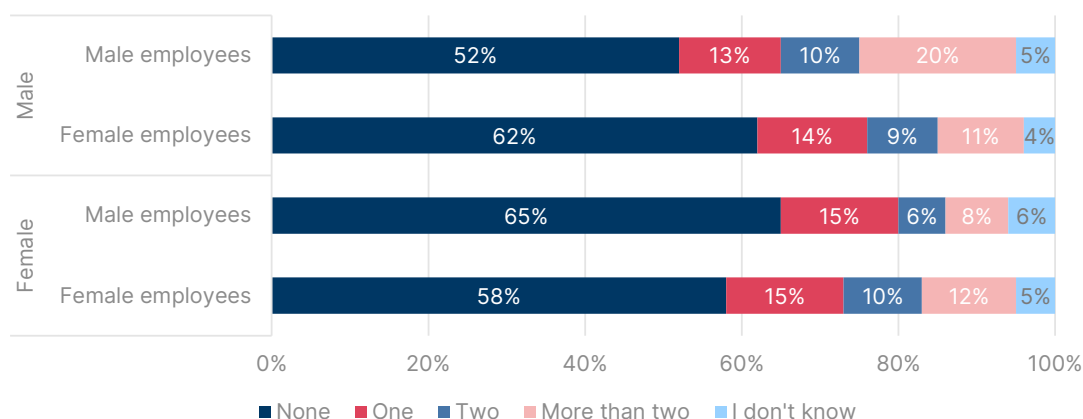


Figure 12. Hiring of full-time female versus male employees by female and male entrepreneurs (n=274). Source: Programme survey

5.5.2 Follow-up survey

We can also look at the amount of paid full-time employees the businesses have. The bottom total row in Table 18 shows that the amount of paid full-time employees increases every year. The number of full-time jobs Orange Corners and OCIF alumni of the 2021 cohort (as reported by the 118 respondents in the Dialogic survey) have created has grown from over 200 in 2020 to 700 full time jobs in 2024. Over 50% of these jobs are conducted by women. The impact of the total population of not only all entrepreneurs participating in 2021, but also from entrepreneurs that participated in earlier or later years in the OC and OCIF programmes is evidently larger but cannot be assessed based on the datasets available.

Table 18. Total number of paid full-time employees as of January 1st (n= 118). Source: Dialogic survey

Entrepreneur	Employees	2020	2021	2022	2023	2024
Male (n = 45)	Male	79	130	191	205	243
	Female	65	113	160	189	242
Female (n = 73)	Male	26	38	62	69	83
	Female	43	69	97	116	125
Total		213	350	510	579	693

In 2024, each Orange Corners alumnus employed on average 5,9 employees. Table 19 shows the median number of paid full-time employees. Both table 18 and 19 also show that female entrepreneurs are more likely to hire paid full time female employees. Female employees are substantially overrepresented in businesses that are founded by female entrepreneurs, whereas male employees are only slightly overrepresented in companies of male entrepreneurs.

Table 19. Median number of paid full-time employees as of January 1st (n=118). Source: Dialogic survey

Entrepreneur	Employees	2020	2021	2022	2023	2024
Male (n = 45)	Male	1	1	2	2	2
	Female	0	1	2	2	2
Female (n = 73)	Male	0	0	1	1	1
	Female	1	1	2	2	2
Total	Male	0	1	2	2	2
	Female	0	1	2	2	2

Furthermore, the relative number of female employees increases across the years. Figure 13 below shows that this is mainly due to the businesses from respondents who only followed the Orange Corners training programme and did not receive OCIF funding. The other sub-groups show a relatively even distribution between male and female employees.

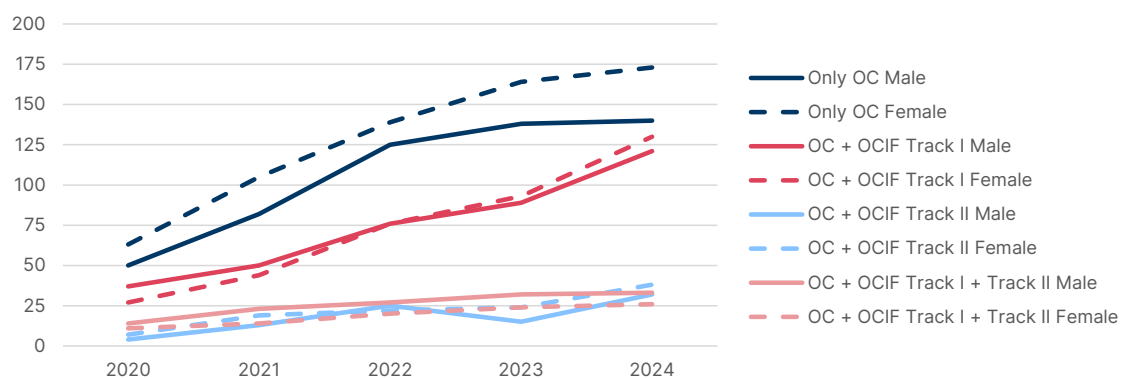


Figure 13. Number of paid full time male/female employees per year, per Orange Corners track (n=118). Source: Dialogic survey

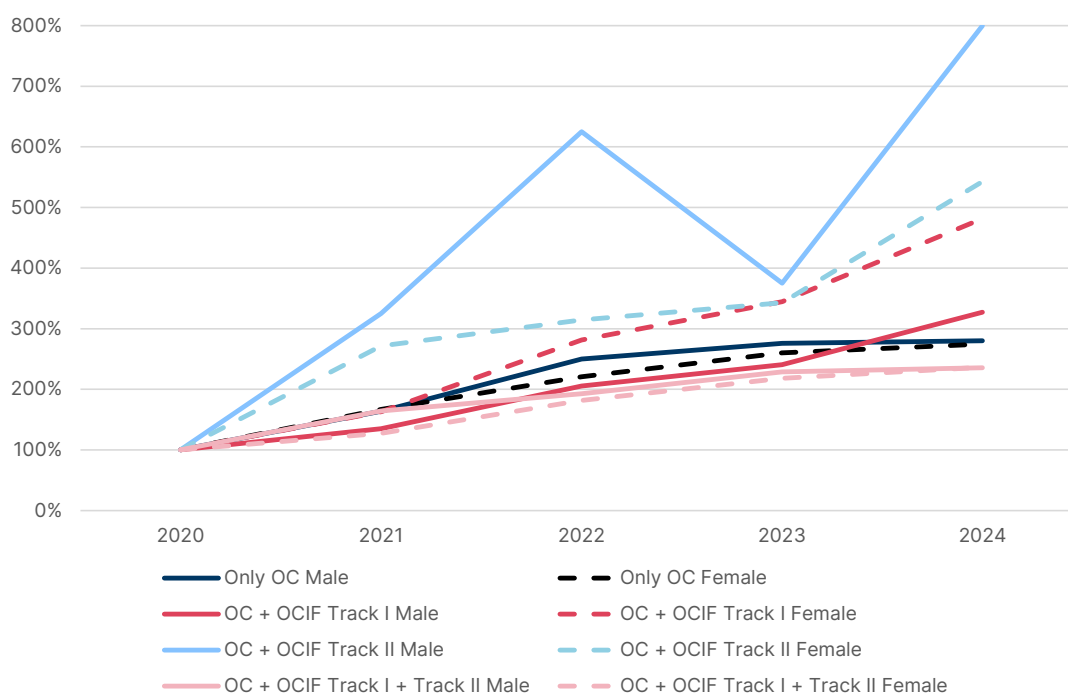


Figure 14. Growth in number of paid full time male/female employees per year (indexed, 2020=100%), per Orange Corners track (n=118). Source: Dialogic survey

When looking at the total number of employees hired by business owners (see Table 20), we see that only a small portion of the businesses surpass the threshold of 10 or more employees (and with that the status of micro-firm). In 2024 only 20 (out of 159) businesses have done so. These businesses are evenly spread amongst the training only (7), OCIF track I only (6), and OCIF track II (7). We see an overrepresentation of these growth firms in the Track II sample, given that least firms acquired OCIF track II..

Table 20. Overview of the number of businesses that surpass micro-firm status (10 or more employees). Source: Dialogic survey

	2020	2021	2022	2023	2024
Only OC	1	2	4	7	7
OC + OCIF Track I	1	2	3	4	6
OC + OCIF Track II		1	2	2	4
OC + OCIF Track I + Track II	1	1	1	1	3
Total	3	6	10	14	20

6 Entrepreneurial ecosystem and role of implementing organisations

In this chapter we will answer two questions: *What particular challenges experience Orange Corners/OCIF-alumni and other stakeholders in the entrepreneurial ecosystem in which they operate? Do Orange Corners and OCIF address the most pressing challenges in the ecosystem?* **The challenges are very context specific on the one hand. The implementing partners can use Orange Corners and OCIF in a very tailored way to adapt to local circumstances. The degree to which they also successfully address these challenges varies substantially per region, due to variation in the scope and scale of these challenges and in the capacities of implementing partners.**

How do alumni and other stakeholders experience the role played by local implementing organisations? **Most respondents (62%) have a positive sentiment regarding implementing organisations and gave positive remarks, especially about access to mentors and advisors. More detailed critical remarks about the implementation were made as well.**

6.1 Portfolio

In the Programme survey the respondents were asked to give their opinion on access to different aspects of the value chain (see Table 21). Access to customers, suppliers and employees seems to be quite sufficient. Over half of the respondents (strongly) agree that they have sufficient access to these elements. Having sufficient access to mentors/advisors, has a lower score, but is still positive. In general, respondents do not think they have sufficient access to international networks.

Table 21. Access to resources (regardless of survey wave). Source: Programme survey

Question	strongly disagree	disagree	neutral	agree	strongly agree	other ⁵⁸
I have sufficient access to customers	5%	12%	16%	33%	21%	13%
I have sufficient access to suppliers	4%	10%	21%	33%	19%	13%
I have sufficient access to employees	4%	12%	21%	33%	18%	12%
I have sufficient access to mentors/advisors	6%	16%	21%	30%	13%	14%
I have sufficient access to an international network	16%	28%	20%	15%	3%	18%

⁵⁸ This category is for those who answered "don't know", "not applicable" or did not provide an answer to this question.

During the programme the access to both customers and suppliers appears to have improved, though this appears to decline in the year after (see Figure 15). Access to mentors/advisors and an international network, however, has improved throughout and after as well. Yet, one should not draw too strong conclusions from the results of the last wave ("1 year after"), given the sharp decline in the response rate (also in relation to potential selection bias). Therefore, we should also look at the outcome of the other sources in the next sections to substantiate these findings.



Figure 15. Access to resources per wave⁵⁹: pre-programme/at graduation/1 year after graduation. Source: Programme survey⁶⁰

⁵⁹ Answer categories add up to 100% per wave.

⁶⁰ For the sake of comparison, we've excluded the "other" category here. This category however differed widely per wave (pre-programme: 14-19%; graduation: 2-9%; 1 year after: 46-52%). The number of responses is thus considerably lower in the last wave.

6.2 Follow-up survey

Most respondents of the survey indicated that finance (70%), market access (63%) and human capital (57%) are important challenges in their region/country (see Figure 16).

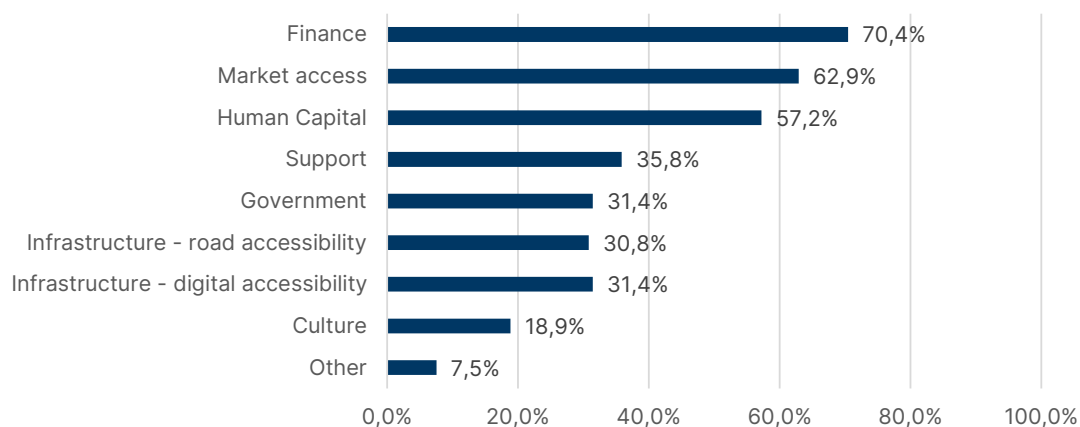


Figure 16. Important challenges in respondents' region/country (n=159). Multiple responses possible. Source: Dialogic survey

When asked to reflect on these challenges and the extent to which Orange Corners/OCIF has addressed them most respondents highlight the importance of the received financial support, and the quality and importance of the trainings. Interestingly only a few respondents mention an effect of Orange Corners/OCIF on access to (quality) human capital and market access, even though more than half of the respondents indicated that this is indeed a challenge.

Respondents were also asked about challenges they experienced specifically when starting their business. Over 80% of respondents (strongly) agreed that access to financing opportunities was a challenge for them. For 70% access to an international network was a challenge as well. Around half of the respondents struggled with access to mentors/advisors, employees, suppliers and customers (see Figure 17).

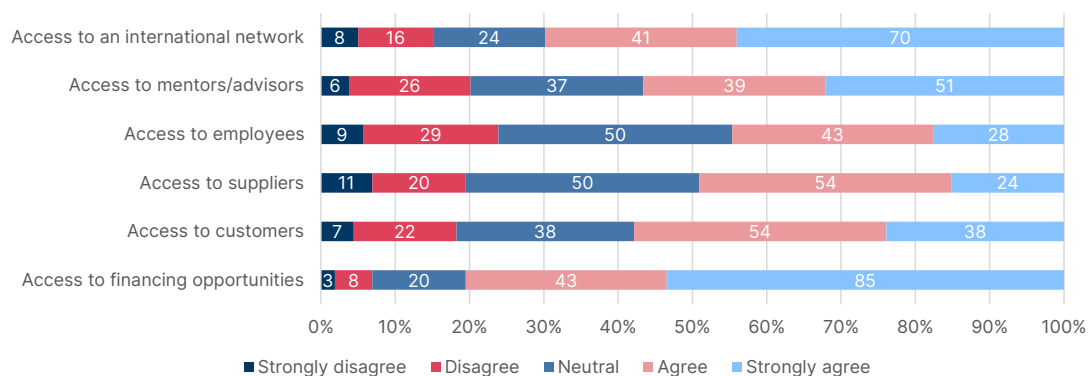


Figure 17. Experienced challenges when starting a business (n=159). Source: Dialogic survey

Respondents are most positive about the impact Orange Corners/OCIF has on the access to mentors and advisors (see Figure 18). This is higher than in quarterly reports in 2021 and 2022 and the Programme survey. This can most likely be explained by the fact that in 2021 and 2022 most participants did not (yet) experience the effect of mentorship that much and it literally takes time to appreciate this mentorship. Even though access to financing

opportunities and access to an international network were the biggest challenges, the impact of Orange Corners/OCIF did not score highest on these aspects. On the extent to which Orange Corners/OCIF helped to overcome, access to an international network is scored the lowest.

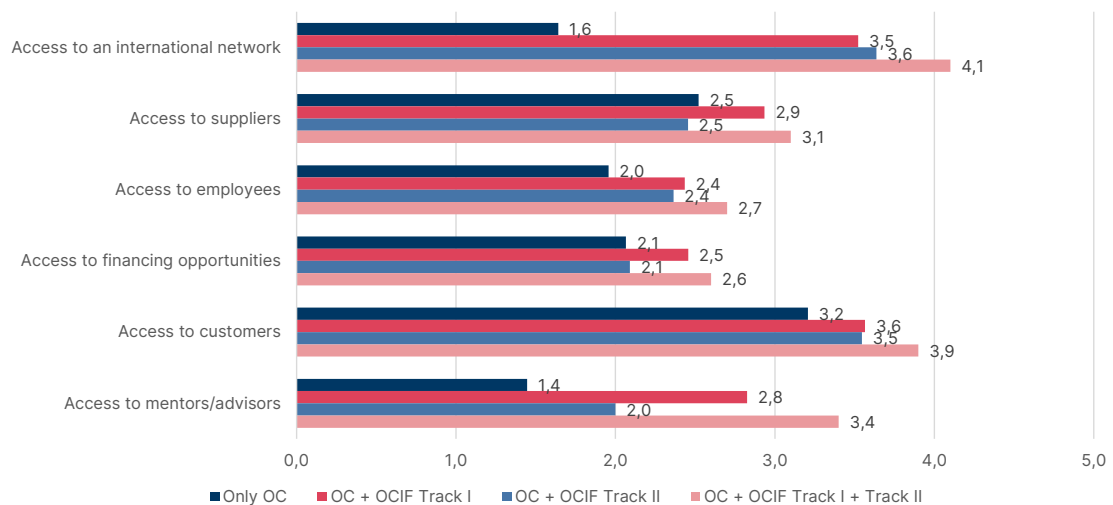


Figure 18. Role for Orange Corners/OCIF to overcome challenges (n=159). Source: Dialogic survey

When asked to elaborate on the aspect of access to mentors and advisors, most respondents emphasise that they highly valued the guidance from mentors and experts in entrepreneurship, and they especially appreciate the intensity of the mentorship track. Some respondents (around 10%) indicate that they have not received any guidance from mentors or experts. Concerning the aspect of access to customers, respondents emphasise the added value of the marketing training where they learned sales techniques and were assisted in defining their target audience. On the ways that Orange Corners/OCIF helps with access to financing opportunities, respondents indicate that Orange Corners helped to overcome financial challenges by providing an initial fund and by providing business developers with tools on how to generate more funding. Some respondents indicate that they feel more confident and experienced to apply for financial support. Others point out how they know how to promote their business more effectively.

Regarding the question “How do alumni and other stakeholders experience the role played by local implementing organisations?” we asked respondents from the different Orange Corners/OCIF regions about their sentiment regarding the implementing organisation. The overall view of these organisations is very positive, with only four percent of the respondents rating the organisations as negative (see Figure 19).

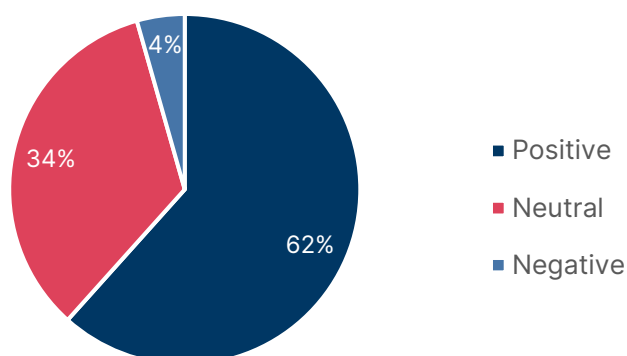


Figure 19. Sentiment regarding implementing organisation (n=159). Source: Dialogic survey

When asked to reflect, almost all respondents gave positive remarks. Some respondents nevertheless mentioned that the trainings that were held online did not contribute enough to networking and some mentioned how the programme did not run as expected during COVID. Changing team members of the implementing organisation also made it difficult for some to remain in contact. The case studies revealed that several countries suffered from this, either because of a high turnover of key personnel in the implementing organization (e.g. Morocco) or because of a change of implementing organization (e.g. Kurdistan Region, Senegal).

However, most remarks regarding the role played by implementing organisations are answered in a more indirect way i.e. in the form of suggestions as how to improve the design and implementation of Orange Corners and OCIF instruments which is discussed separately in chapter 7.

6.3 Interviews

The interviews with entrepreneurs showed that the implementing organizations improve the access to mentors/advisors: this is a key element of the Orange Corners programme. The introduction of OCIF seems to have the double effect that it not only partly tackles the lack of finance for entrepreneurs, but it also makes most of the entrepreneurs more investment ready, and thus improving the access to finance for a larger group than those that receive OCIF track II.

However, the implementing organizations seem to do less to enable access to customers. The focus of the Orange Corners programme is more on getting support for improving the business model and investor readiness, than on getting direct access to customers. This is also echoed in the recommendations for Orange Corners to act more as a bridge to international markets, and to enable more market research for example.

6.4 Case studies

Each country and region has its own specific entrepreneurial ecosystem challenges.⁶¹

⁶¹ See the Africa Entrepreneurial Ecosystem Index for a comparative analysis of the entrepreneurial ecosystems of African countries: <https://africa.ecosystem.build/>

Morocco has developed into one of the most advanced economies of Africa, with a large set of entrepreneurship policies. Also, the number of entrepreneurship support organisations has increased substantially in the last five years. However, the roundtable and stakeholder interviews revealed many challenges. First, even though there is a substantial number of entrepreneurship support organisations, there is a lack of high-quality support, and there is a lack of coordination between the entrepreneurship support organisations and other players in the Moroccan entrepreneurial ecosystem. There is a need for more professional, specialised entrepreneurship support. Second, the education system does not function well, and there is a lack of entrepreneurship education in particular. There is insufficient access to finance (although some interviewees mention that the bigger problem is a lack of investment ready projects). Finally, there is a lack of entrepreneurial culture.

Orange Corners increases the average quality of entrepreneurship support in Morocco and also tackles a small part of the funding problem with OCIF. The Orange Corners programme does not seem to directly develop the Moroccan entrepreneurial ecosystem: it adapts to the (local) ecosystem, and connects to other actors in the ecosystem, and nurtures entrepreneurs that can give back to the ecosystem. It does this in particular (with La Caravane) outside the core Casablanca-Rabat region (where most of the entrepreneurship support organisations are located), and in this way proves to be very additional to the existing supply of entrepreneurship support.

Egypt is one of the big 4 entrepreneurial economies in Africa, with one of the largest inflows (in absolute numbers) of venture capital. It has a relatively well-developed infrastructure (provision of electricity, access to internet), overall human capital, and a large home market. The roundtable revealed that there is a lack of adequate policy in particular for the Upper Egypt region, and for Egypt in general. There is no appreciation of the specific context of Upper Egypt from the national government, and it is difficult to export from Upper Egypt, even to reach for example exhibitions in Cairo. There is also a lack of coordination at the national level, for example there is no alignment between the more than 80 entrepreneurship support organisations (that are mainly located in Cairo) on who does what in the entrepreneurial journey, to have a division of labour in the support pipeline. In addition, there is a lack of access to finance, and in particular in matching between finance supply and demand (especially for female entrepreneurs). Finally, there is also a lack of entrepreneurship education.

The Orange Corners programme in Upper Egypt explicitly aims to improve the entrepreneurial ecosystem in Upper Egypt, involving many local stakeholders. However, local stakeholders still feel that Orange Corners should connect more to local entrepreneurial ecosystem stakeholders, during the whole programme (not just with the events). There is also no OCIF involved (yet), which limits the opportunities for tackling the funding gap.

Nigeria is also one of big 4 entrepreneurial economies in Africa, with a very strong entrepreneurial culture, but faces many challenges in its entrepreneurial ecosystem. The roundtable revealed convergence on many challenges, in particular access to finance, access to markets, physical infrastructure, policies and regulation, and talent. For SMEs it is very difficult to get a loan, and when they do get a loan, the interest rates are extremely high. The roundtable participants perceived the lack of investor readiness more of a constraint than lack of startup funding. The physical infrastructure is highly problematic: both road infrastructure and energy supply. There has been a lack of sufficient and stable energy supply for decades, but it has become even more pressing with rising fuel prices, which has increased energy costs (fuel for transportation and generators) to such a degree that it has become very difficult for many firms to still have a viable business model. There are also many challenges with respect to policies and regulations. There is a multiplicity of government agencies not aligning their

policies, there is multiple taxation when products move between states, and there is policy confusion, with unclear policies and random changes, which make it very difficult to invest in Nigeria. Finally, there is a huge talent problem, with very low-quality public education.

With so many challenges, it may seem difficult for an implementing partner to act in the ecosystem. However, the FATE Foundation (the implementing partner in Nigeria) stands out as one of the longest established entrepreneurship support organisations (since 2000) in the country and perhaps even in Africa. It has been actively engaged in policy advocacy with policy reports and dialogues to improve the Nigerian entrepreneurial ecosystem, and the Orange Corners programme also has a well-developed university student ambassador program, which connects the programme to universities and improves the access to talent and entrepreneurship education in the country. In addition, the OCIF programme contributes to tackling the finance gap.

7 Key takeaways from this evaluation

7.1 Introduction

In the preceding chapters we assessed as far as possible as the various research methods allowed what the medium-term outcomes of Orange Corners and OCIF on the youth entrepreneurs who have participated in these programmes have been. The evaluation – focussing on the development of the 2021 participants for Orange Corners (cohorts 2021) and 2023 participants (cohorts 2023) for OCIF - showed entrepreneurship in all sorts of businesses at various development stages is supported. Rather than supporting tech-enabled start-ups and scale ups that develop into fast growing firms, most of firms supported are micro-firms and only few of them grow out of the micro firm size category, to possibly become star performers.

In this chapter we present the key takeaways from this outcome evaluation by answering the following four key questions related to respectively outreach, personal development, business development and the wider challenges of the entrepreneurial ecosystems and the role of implementing organisations of OC and OCIF programmes:

- 1) How are participants (whole population & target group of this outcome evaluation) distributed in terms of location, sector, business stage, political context (state fragility) and gender? (Outreach)
- 2) Personal development: How did Orange Corners alumni personally develop three years after following the Orange Corners training programme and what was the role of Orange Corners in this personal development?
- 3) Business development: How did businesses of entrepreneurs develop three years after following the Orange Corners programme and OCIF Track I, and 1 year after receiving OCIF Track II support, and what was the role of these programmes in this business development?
- 4) the wider challenges of the entrepreneurial ecosystems where the programmes are active and the role of the implementing organisations.

7.2 Outreach

The main takeaways regarding outreach of the OC and OCIF programmes are the following:

- The 2021 cohorts the OC program are based in North Africa (Algiers – Algeria, Cairo and Upper Egypt – Egypt, Casablanca-Rabat and Tanger – Morocco,), Sub-Sahara Africa (Abidjan - Côte d'Ivoire, Kinshasa - Democratic Republic of the Congo, Accra – Ghana, Maputo – Mozambique, Lagos – Nigeria, Johannesburg – South Africa, Dakar – Senegal, Khartoum - Sudan), and the Middle East (Baghdad and Erbil, Iraq). These are all locations in low- and middle-income countries, and many of these countries can be characterized as **fragile states**, and some even extremely fragile (Iraq, Sudan, and Democratic Republic of the Congo).
- 5111 entrepreneurs applied for these 2021 cohorts, and 294 were selected (6%), indicating a very **strict selection**. This selection is most strict in the most fragile regions, because of the much higher number of applicants in these regions. This either indicates a more active per-program outreach to potential participants in these regions (unlikely), or (more likely) a larger group of (potential) entrepreneurs that does not have access to any other support in these regions.
- The participating businesses come from a **variety of sectors**: the largest group can be found in agriculture (21%), followed by internet and communication technology

(12%), health & safety (9%), education (9%), food, drinks & entertainment (8%), engineering (6%), professional business services (6%), and energy (5%), representing the largely sector-agnostic approach of the OC program.

- Most of the businesses enrolled in the OC program without having a product on the market (60%). A **few have introduced a product on the market** (5%), 22% have paying customers, while 15% are already making a profit. So, the majority is in the ideation phase, but a large group has already entered the startup phase.
- The **gender division** is not equal, with 38% of the applicants being female, and 45% of the selected entrepreneurs. This means that the aspired majority share of women has not been achieved.
- A large majority (97%) of the participants is aged 18-35 years when they start the program. This shows that the program largely succeeds in its targeting of **young entrepreneurs**.

In terms of outreach we see as most remarkable outcomes that 1) over 50% participants in the pre-programme stage are in a business stage that is insufficient for sustainable operations; 2) In fragile regions the number of applications is much higher than in nonfragile regions (leading to a situation where potential participants in extreme fragile regions have a very low chance of being selected); 3) women are slightly underrepresented in Orange Corners/OCIF, specially in (extremely) fragile counties.

7.3 Personal development

The main takeaways regarding the personal development triggered by the OC and OCIF programmes are the following:

- The participants appreciated the Orange Corners program's **unique blend of training, mentorship, networking, and support**, which helped them develop essential business skills and achieve their goals. In general, alumni are very positive about the skills and knowledge Orange Corners has brought them. The three skills acquired/strengthened during the OC program that stand out are 'Using my imagination and abilities to identify opportunities for creating value' (81% of respondents), 'Believing in myself and keep developing' (76%) and 'Decision making, thus dealing with uncertainty, ambiguity and risk' (71%). The participants have become more self-confident, and Orange Corners has taught them **entrepreneurial skills**, like imagination and opportunity recognition, decision making and financial literacy. This is especially useful for the group of young entrepreneurs who have little to no business experience before they started with the Orange Corners programme. This is also reflected in their motivations for applying for the Orange Corners programme, especially acquiring knowledge and skills, and receiving mentorship and guidance. However, many also mentioned access to **funding** (especially when OCIF was available). Funding was a key reason for many participants, as they needed financial support to launch or grow their businesses, in a context with very limited access to finance.
- With respect to the **income generation** of the business developed during the Orange Corners programme, we see a clear division into two groups: for the majority of "Orange Corners only" participants their business is not their main source of income, while for the majority of OCIF participants the business is their main source of income.
- The programme also had several positive **unintended effects**. The skills the participants acquired turned out to be not just important for their current business, but also for (often better) follow-on businesses, and jobs. The most often observed

unintended effects in the interviews were the start of follow-on businesses (even in the short period of less than three years after participation in Orange Corners) and the development of a network or entrepreneurial community by the Orange Corners alumni. A large share (64%) of the respondents has founded multiple businesses. In total 144 additional businesses were founded by a group of 156 respondents, and 73% (105) are still operating.

- The learnings from the Orange Corners program led to some cases in which the entrepreneur decided not to (actively) continue with the initial business but start other more promising ventures. **Learning communities** were often formed by members of one cohort, but sometimes also involved entrepreneurs from multiple cohorts. Many of the participants value becoming part of a like-minded network, or even an entrepreneurial community. Another unintended, but very welcome effect from the Orange Corners/OCIF-perspective revealed in the interviews is that many entrepreneurs were “**paying forward**” to the entrepreneurial ecosystem: they acted as mentor and sometimes as trainer for a next generation of entrepreneurs in their region.

With respect to personal development – on which no programme goals were formulated – we see as the most central outcomes that alumni are very positive about the skills and knowledge Orange Corners has brought them. We also observed that for the majority of Orange Corners-only participants their business is not their main source of income, while for the majority of OCIF participants the business is their main source of income. A key outcome is also that almost two third (!) of the participants founded additional businesses.

7.4 Business development

The main takeaways regarding the business development triggered by the OC and OCIF programmes are the following:

- Our survey indicates that 81% of the businesses that participated in the Orange Corners programmes have survived the first three years after the programme. This is higher than the “global average” of 60-70% surviving after three years. But the degree to which this high **survival rate** is explained by selection or treatment effects cannot be discerned in this study. It is also likely that respondents with a successful business are more likely to complete our questionnaire (which may, given the high non-response rate, drive these results substantially). Most of the interviewed entrepreneurs mention that the support of Orange Corners greatly enhanced the development of their business. They especially mention the improved strategy, finance, marketing, operations and overall business model due to participation in the Orange Corners program. Most of the respondents of the RVO survey also state that the Orange Corners network has been helpful in growing their business.
- With respect to **finance**, participation in the Orange Corners program (and for some OCIF track 2) is associated with an increasing access to equity finance from angel investor and corporate investment funds, and leads to less often receiving money from family and friends. In addition, participation in the Orange Corners programme is associated with an increase of receiving subsidies and grants. Entrepreneurs seem to have outgrown the startup phase in which loans from family and friends often dominate.
- Our analyses of the survey revealed that there is a substantial difference between the business development of “**Orange Corners only**” entrepreneurs and entrepreneurs that received a **combination of Orange Corners and OCIF**. Businesses of respondents that have participated in Orange Corners and received funding through

OCIF (Track I and II) have the highest survival rate. This is to be expected since these respondents received additional funding. This could also partially be explained by the thorough selection of entrepreneurs that receive Track II funding. The analyses of our survey show that entrepreneurs that received OCIF Track II funding, already had (on average) more employees at start (in 2020), indicating a selection effect. Presumably the most talented entrepreneurs with the best business ideas receive funding in Track II, while the less promising entrepreneurs only participate in Orange Corners and receive Track I funding. Many entrepreneurs that have received OCIF also state that it would have been difficult to accelerate their business without this. The entrepreneurs that received Track II funding also had (on average) more employees in 2024.

- Regarding **financial viability** we conclude that most of the businesses are not yet financially viable after three years. They do not have multiple paying customers and are not yet profitable. This means that many of the businesses have not yet taken off, even after three years. The entrepreneurs of these unprofitable businesses get their income from other businesses or occupations. This is also reflected in the income generation data that show that for most Orange Corners participants without OCIF, their business is not their main source of income.
- Overall, we see that one year after graduation, almost 50% have paying customers and almost 20% is a profitable company. This indicates substantial **progress**, as only 22% had paying customers and 15% of the participants had a profitable company at start of the programme.
- Also, here we see a clear **distinction between OC only and OCIF participants**: approximately 60% of the companies with OCIF support have already developed products for multiple customer segments, while for companies with Orange Corners support only, this figure is much lower (33%).
- **OCIF track I** seems to have a much smaller effect than **OCIF track II**. For many entrepreneurs OCIF track I did not make the difference, but it helped them to cover some daily expenses and to develop the prototype and the ultimate product. OCIF track II has been very important for the development and growth of the businesses. OCIF II enabled them to invest substantially in machines and staff and expand into other regions and countries. OCIF track II fills the finance gap that is present in most of the countries in which Orange Corners is active, and in this way accelerates the development of the participating businesses.

7.5 Entrepreneurial ecosystem

The main takeaways regarding the development of the wider entrepreneurial ecosystems and the role of implementing organizations are as follows:

- The participating entrepreneurs face **multiple challenges** in their entrepreneurial ecosystem, in particular access to finance (70%), market access (63%), and access to suitable human capital (57%). When starting a business, most of them perceive access to financing opportunities, access to an international network, access to customers and access to mentors/advisors as a challenge. The Orange Corners program was perceived to be most effective in solving the "access to mentors/advisors" challenge, while the other challenges were perceived to be less often overcome by OC/OCIF. The interviews indicate that the Orange Corners program does improve the access to valuable mentors and advisors, which also positively affects the

investment readiness of the businesses. However, the Orange Corners program seems to do less to enable access to customers and to international networks.

- With respect to the effect of the Orange Corners programs on the overall entrepreneurial ecosystems, very specific pictures emerge, reflecting the **nature of national and subnational entrepreneurial ecosystems**, and also the **differences in the effectiveness of the implementing organizations**. The additionality of the OC programmes seems to be the highest in regions with hardly any entrepreneurship support, where the relative weight of the Orange Corners activities is much bigger. For example, the additionality of the Orange Corners programme seems to be much bigger in the peripheral regions of Morocco and Egypt, than in Casablanca and Cairo, in which already a dense support infrastructure exists. Also, the very high application rates in very fragile regions suggest that there seems to be much more demand for entrepreneurial support, as provided by the Orange Corners program, in very fragile regions than in less fragile regions. The survival rate is comparable in these two types of regions, suggesting that the Orange Corners program is particularly impactful for very fragile regions.
- The effectiveness of the programs is likely to depend very much on the **quality of the local implementing partner**. However, the survey response numbers per country are too low to provide a reliable evaluation. The interviews in the five regions show that the quality of the implementing organizations differed substantially. In some regions the low quality of the services provided also led to a change of implementing partner (e.g. in Iraq and Senegal). In other regions the internal organization of the implementing partner was very fragile, with a lot of staff dynamics (Morocco), which harmed the monitoring and evaluation process (several other regions could also not provide sufficient monitoring and evaluation data). In other regions (e.g. Nigeria and Egypt), the Orange Corners program was implemented by long-standing local partners that seem to have further developed their services and outreach with the support of Orange Corners and the Dutch embassies. The Dutch embassies play a pivotal role in connecting the Netherlands and Dutch firms more in particular to the local Orange Corners program.

On top of these key findings, we find it important to flag that there are important intended and unintended effects on the wider entrepreneurial ecosystem. Orange Corners and OCIF are mostly appreciated for their long-term presence. Finally, learning and even entrepreneurial communities are formed by OC alumni, that also give back to their ecosystem.

8 Improvement & recommendations

8.1 Introduction

This final chapter revolves around improvement and recommendations and attempts to answer three specific questions: 1) How can the design of Orange Corners or OCIF-instruments be further improved? What elements are particularly effective and need strengthening? What elements are less effective? What elements are missing and could possibly be added?; 2) How can the way Orange Corners/OCIF are implemented be further improved?, and 3) Which practical recommendations can be incorporated in a roadmap for the future development of Orange Corners and OCIF? In section 8.2 we will answer questions 1 and 2 in one section thereby using the feedback from participants of the Orange Corners and OCIF programmes as given in the portfolio-data (i.e. earlier Programme surveys), the newly gathered survey data as well as interview data (case study interviews as well as interviews with implementing organisations and Dutch policymakers). We combine questions 1 and 2 here as design of the schemes and implementation of the schemes are directly related and especially sometimes hard to separate in the answers from the entrepreneurs. Entrepreneurs do also not differentiate between the original design and the actual implementation of the programmes as they mainly reflect on how they perceive the programmes as delivered. In section 8.3 we zoom out a bit more and reflect on some further avenues for the future development of both programmes. Section 8.4 provides practical recommendations for future evaluations of both programmes.

We emphasize here once again that this outcome evaluation focuses on programme participants (alumni) from the year 2021. It is important to acknowledge that the programme has undergone significant development since that time. Key changes include the expansion of the OCIF, a gradual shift from supporting ideation-stage entrepreneurs to more mature ventures, efforts to strengthen the use of alumni-networks and the transition to a subsidy framework under Orange Corners Incubation and Acceleration Component (OCIAAC). As a result, some of the recommendations from this report are already (partially) adopted by the programme management.

8.2 Possible improvements of Orange Corners and OCIF instruments

In this section we will answer two questions: *How can the design of Orange Corners or OCIF-instruments be further improved? How can the way Orange Corners/OCIF are implemented be further improved?* In this section we focus on the experiences and suggestions made by participants and some of the implementing organisations. We do not summarize the suggestions here as we summarised them already in the main text below.

From the portfolio data - and especially the open questions in quarterly reports on the OC programme - suggestions for improvement of the programmes are available from participants. Even though the challenges experienced and hence the suggestions made may differ considerably across regions. We identified the following themes among the answers:

- Engagement issues: speaker selection, relevance for masterclasses, difficulty in attracting and retaining new (female; for some regions) incubates, engaging competent mentors, low attendance due to external factors (elections, currency changes, cash crunch, petrol scarcity).
- Technical issues: limited internet accessibility in remote regions.

- Organisational issues: improve communication with applicants, specifically with relation to selection process and the programme goals, scheduling issues (especially towards the end of the cohort).
- Financial issues: attracting private partners, limited access to finance for young entrepreneurs.

Some of the themes of issues mentioned clearly relate to the design and the actual content of the programmes, other reflect the complexity of running such a programme in resource constrained and relatively unstable contexts.

The survey proved very informative in terms of suggestions to further develop both the Orange Corners and OCIF programmes. Based on the survey answers, here are the key issues experienced by – at least some of- the participants:

- Lack of financial support: the programme can provide more financial support or connections with investors to help them launch their businesses.
- Insufficient networking opportunities: through the programme more opportunities can be created to connect participants with each other and with potential investors, partners, and customers.
- Limited depth in training content: training sessions are too basic and do not provide enough practical skills or advanced knowledge (at least to some participants).
- Inadequate mentoring: although the mentorship programme is appreciated, many participants feel that it could be improved by having more personalised matching between mentors and incubates, and more face-to-face meetings.
- Poor communication and organisation: some participants experienced difficulties with scheduling, notifications, and access to content, which caused frustration and missed opportunities.
- Limited geographical coverage. It was mentioned that the programme was only available in one particular city and some participants felt that it should be expanded to other locations.
- Too many lectures and not enough practical sessions. A preference for more hands-on training and fewer lectures was mentioned.
- Lack of focus on local businesses: it was mentioned by some participants that the programme focused too much on international examples and did not provide sufficient context for local businesses.
- Insufficient support for legal and financial aspects: there are participants requesting for more guidance and resources on issues like registration, taxation, and funding.

Overall, the mentorship, training and financial support are highly appreciated. However, only very few respondents mention an effect of Orange Corners/OCIF on access to (high quality) human capital and market access, even though more than half of the respondents indicated that this is indeed a challenge. A stronger focus on marketing, sales and customer development seems to be needed to realize more viable businesses. The current focus of many implementing partners seems to be more on making the participating business investment ready, than on customer development. Once businesses get market traction, access to and integration of (high quality) human capital becomes more important and should get more attention in the Orange Corners program. The latter is especially important to scale innovative startups.

We also openly solicited for suggestions for improvement in our survey. Participants of the programme made multiple – sometimes very hands on – suggestions as how to further improve the design and implementation of the programmes:

- Post-completion support: include some form of support after Orange Corners/OCIF ends. Some participants indicate that some more guidance on scaling and implementation would be beneficial.
- Incorporation of alumni: participants suggest making more use of alumni in the programme. This would give them more exposure and would allow the current cohort to learn from past experiences.
- Financial support to all participants.
- International network of Orange Corners participants. Respondents suggest utilising the opportunities for communication with young entrepreneurs in other Orange Corners hubs more. This could provide access to more markets.
- Integrate network workshops with local entrepreneurs outside the programme.
- Be careful not to change team members of the implementing organisation too frequent as this makes it more difficult to remain in contact.
- Consider designing standardised training materials to avoid differences in the quality of the training.
- Include more practical components such as field visits, instead of the heavy focus on (online) meetings and lectures. Online meetings (much used in Corona period) are according to some alumni no substitute for more physical forms of networking.

We know the OC and OCIF management already deal with some of these suggestions such as fostering an (also international) alumni community and using alumni more actively in the programme and creating (international) including alumni community and scaling up OCIF.

In the five case study countries, we also interviewed entrepreneurs, the stakeholders (mainly in the three roundtables) and implementing partners to suggest improvements for the Orange Corners and OCIF programmes. We highlight recommendations that have been made by more than 2 respondents:

- The most frequently mentioned suggestion for improvement (mainly by entrepreneurs and implementing partners) is to increase the ties between the different Orange Corners Hubs, including the Netherlands: this would increase the international market access for the entrepreneurs, and increase the opportunities for entrepreneurs to collaborate with internationally with other entrepreneurs. While most of the businesses are not (yet) internationally active, they sense that more international opportunities for sales and learning can be made possible by the Orange Corners programs.
- Many entrepreneurs and implementing partners suggest having more sectoral focus in the cohorts. This may attract more relevant mentors and learning materials for them and might also increase the opportunities for peer learning. This may be catered to with sub-groups of participants in similar or related sectors, or to fully dedicate each cohort to a particular sector (or related sectors).
- Many entrepreneurs and implementing partners also suggest having a more similar group of participants, with respect to the development of their business. This may also increase the learning opportunities for participants: for example, growth businesses do not learn much from solo self-employed in the same cohort. This is already catered to, to some degree, with local hubs having developed more targeted approaches regarding business phase.

- Many entrepreneurs and implementing partners recommend having more follow-ups with entrepreneurs after the Orange Corners and OCIF programmes. This can be stimulated amongst alumni or enhanced by having parts of the program (events) open for alumni next to the new cohort.
- Stakeholders and implementing partners often recommend connecting the Orange Corners and OCIF programmes better to the local entrepreneurial ecosystem, and to improve the entrepreneurial ecosystem, for example with increasing the pipeline of potential participants (with entrepreneurship education and support at local universities) and adapt more to the entrepreneurial ecosystem. Some good practices could be shared more: for example, the student ambassadors in Lagos, to connect local universities to the Orange Corners program. Another effort that could strengthen the ties in the ecosystem, is to connect more to local investors, within the Orange Corners program, or to the most successful OCIF participants for follow-up funding.

These suggestions for improvement could help to better meet the needs of the participants and help them achieve their goals. Two generic suggestions stand out: increase the ties between the Orange Corners hubs and with the Netherlands, and have more attention for the development of entrepreneurs, their businesses, and their network after the programme. It should be borne in mind that most of the participants were quite satisfied with the programmes, and the above list is not a list that is representative for all participants. It should be read as a list of potential programme improvements by a selection of respondents.

8.3 Practical recommendations for a roadmap

In this section we will answer the question: *Which practical recommendations can be incorporated in a roadmap for the future development of Orange Corners and OCIF?* The answer to this question is summarised in the policy design dimensions that are given below. For some of them we have formulated a recommendation.

We recognise most of the conclusions of the midterm evaluation of the PSD Toolkit in 2022 and the 2022 impact evaluation of OCIF (see section 2.4). This outcome evaluation supports for instance the conclusions of evaluation of the PSD Toolkit on the relevance of OC and OCIF for youth entrepreneurship but less so for youth employment; the effectiveness in creating a pipeline of young start-ups and more widely its contribution to creating business skills, an entrepreneurial mindset and increased networking among young (aspiring) entrepreneurs and the mixed evidence regarding the sustainability of the Orange Corners programme. Also, its conclusion regarded the mixed additionality of Orange Corners programme is mirrored in the results we have presented. Regarding the latter we propose to more strongly focus on those hubs (and within hubs on those subregions in hubs) where support for youth entrepreneurship and financing mechanisms is largely missing. We also support the suggestion as to stimulate leveraging third-party financing (which also requires taking the entrepreneurial ecosystem perspective more than a pure programme perspective as a starting point) and to (continue) stepping up the monitoring and evaluation activities (see section 8.4 for a few suggestions). We also do recognise most of the conclusions of the OCIF impact report and recommendations made, although our assessment was less dedicated to OCIF. We do however doubt whether it is realistic to more strongly focus on financing digital and green entrepreneurship and innovations as we observed that supporting entrepreneurship and growing a business is tough enough and selecting high quality and promising entrepreneurs is possibly more important than focussing on selected industries.

Both Orange Corners and OCIF are examples of policy programmes that are very much policy-in-action programmes. Policy learning is taking place along the execution of both programmes. Programme management is open to adapt the programme and its execution if

needed and this is also reflected in an eagerness to invest in monitoring, learning and learning. However, there are still policy design dimensions where a clearer choice can be made in the years to come. We list them here briefly:

- A. **Position Orange Corners and OCIF as a broad programme supporting entrepreneurship or as programme that primarily focuses on scalable innovative startups?**⁶² As is evident from this intermediate outcome evaluation Orange Corners and OCIF do reach a considerable number of entrepreneurs and play a role in their business development. However, these are mostly micro-firms in all sorts of trades and industries, which do not seem to be very innovative and scalable. We therefore recommend to clearly articulate whether Orange Corners and OCIF is focusing on broadly supporting entrepreneurship among young people or on a much smaller subset, including scalable innovative startups. A focus on the latter would require a major redesign of the programmes and we doubt whether especially in the very fragile environments it would be realistic and feasible to do so. However, as we also notice that many of the firms supported through especially Orange Corners are marginal firms, with a limited growth rate and hence limited economic impact the programme management may want to consider if the selection criteria for entering Orange Corners need to be stricter.
- B. **Coupling of Orange Corners and OCIF?** We see the logic of coupling the two. To make considerable investments in scalable innovative startups through OCIF an investor needs to get to know the entrepreneur and his/her firm quite good. Orange Corners is a way to do so. The other way round, for successful entrepreneurs that benefitted from Orange Corners it is beneficial to have a funding scheme available that more or less knows them and be able to secure funds for future growth. We therefore recommend keeping the Orange Corners and OCIF package. This also implies that organisations that implement Orange Corners and OCIF – in most cases separate identities – need to coordinate. Orange Corners and OCIF management need to consider how this can be done most effectively and efficiently.
- C. **Level to which especially for Orange Corners (and to some extent for OCIF) should focus more on the stages preceding and stages following the actual incubator and accelerator programme?** As observed Orange Corners does already invest in supporting entrepreneurship among e.g. students. It also invests in extending the effect of the Orange Corners intervention by creating alumni networks or by coaching incidentally after the participation in the programme. OCIF could benefit from some longer “handholding” i.e. supporting and coaching entrepreneurs during the years they receive OCIF-support or even after finalising the OCIF trajectory. Our recommendation is to step up these pre- and post-Orange Corners and post-OCIF support activities to increase the impact of both programmes.
- D. **Need for an OCIF track III or not?** In our interviews it was mentioned to consider introducing an OCIF track III as to bridge the gap between the smaller loans and grants provided through OCIF and for examples financing solutions as offered by Invest International. Typically, there is a financing gap between the current ticket size of OCIF and typically grants and loans of 200k-plus. We suggest that at least for the time being not to invest in a OCIF track III facility. OCIF Track II is only

⁶² Especially OCIF aims to provide support for both knowledge and finance to develop and scale up innovations.

underway for a few years and some extra time is needed to be able to conclude to what extent OCIF II is successful in both developing the business but also to connect the business to follow-up funding, or fund expansion with retained earnings.

- E. **Formulate personal development goals for Orange Corners and OCIF next to goals in terms of business development, yes or no?** Questions on how Orange Corners and OCIF impacted personal development next to business development have been dealt with for the first time in this evaluation. The development of transferable entrepreneurial skills proved to be important, not only in relation to business with which (aspiring) entrepreneurs participated in the OC and OCIF programmes, but also beyond these businesses. We therefore suggest to also formulate some goals regarding the personal development to which OC and OCIF may contribute and to continue monitoring and evaluating this in the near future.
- F. **How homogeneous should the cohorts be?** Especially from the survey among entrepreneurs as well as from the interviews with them we learn that the effectiveness of the programmes is associated with a certain level of homogeneity. Especially more advanced entrepreneurs that have passed the level of basic business skills not only ask for more tailor-made education and training but also suggest that they would benefit from being in a class with entrepreneurs from the same sector or industry and with similar levels of experience. Entrepreneurs that are still at the beginning of their journey as an entrepreneur on the other hand can still learn from more advanced entrepreneurs irrespective of their sectoral background. In quite some regions the number of candidate entrepreneurs is low and there is not that much room to opt for more homogeneity, however if the stream of candidates is big enough more homogeneity would help to increase the effectiveness of Orange Corners.
- G. **Should Orange Corners and OCIF stay sector agnostic or not?** A related issue is that the Orange Corners and OCIF programmes are in principle sector agnostic, but in practice entrepreneurs in some sectors are more welcome than others. This mostly has to do with embassies that prioritise certain industries. However, especially in (extreme) fragile regions there is not that much room for preferential treatment of entrepreneurs from one sector above another sector. Here we recommend in line with the preceding point to choose for dealing with more homogeneous groups whenever the size of the population of candidate entrepreneurs allows for it.
- H. **Still benefit from the flexibility of the wider PSD Toolkit or develop into an independent and better visible Orange Corners and OCIF instrument?** So far Orange Corners and OCIF have developed as part of the wider PSD toolkit. Especially regions working with the PSD toolkit could benefit from the mix that suits them best. And in terms of budgets between the various sub instruments in PSD toolkit there is some mutual flexibility. However, both Orange Corners and OCIF have grown, with a substantial budget and therefore could benefit from moving to a separate budget and instruments that are also better visible to the outside world. We can see the logic of both, but especially when Orange Corners (and hence OCIF as the two are coupled for new regions where Orange Corners would be offered) would be offered in more regions⁶³ it seems logical from our point of view to create a separate budget

⁶³ In a recent poll among embassies that can make use of the PSD instrument (but do not yet) almost all regions showed an interest in the Orange Corners and OCIF instrument.

code for Orange Corners and OCIF and increase its visibility (and accountability).

- I. **Leverage the Dutch investment in supporting entrepreneurship for development purposes by teaming up other donors or not?** Finally in some interviews the suggestion was made that currently Orange Corners and OCIF are managed as Dutch instruments (also in their marketing communication) whereas there might be opportunities to also use them as a level to attract additional funds from for example international donors or organisations such as the African Development bank or the EU.⁶⁴ Although this might increase the budget for Orange Corners and possibly also OCIF-type of funding it might reduce the flexibility to steer and to decide on the scheme. Additionally, it will reduce the room to brand it as an initiative from the Netherlands. The answer to this policy question is mostly a political decision.

8.4 Practical recommendations for future evaluation

How can future evaluations of the Orange Corners programs be improved? This study could not trace the impact of the Orange Corners and OCIF interventions, because the monitoring and evaluation framework does not include a control group. This makes it impossible to separate selection and treatment effects of the Orange Corners and OCIF program: does Orange Corners and OCIF select the most promising entrepreneurs and businesses? (selection effect); does Orange Corners and OCIF have positive effects beyond the development of the entrepreneurs and businesses that would have been taking place without Orange Corners and OCIF as well? Better evaluations at the person, business, ecosystem and societal level could be achieved in the future, to gain more insight into the effectiveness and efficiency of the programs. This is essential for legitimizing the use of (public) resources and to improve future interventions with similar programs. Overall, we suggest following the state-of-the-art guidelines for entrepreneurship policy evaluation provided by Storey and the OECD.⁶⁵ We will provide some practical recommendations for future evaluation below.

For a more effective evaluation at the person and business level we recommend creating a control group of similar persons and businesses and track them as well, to be better able to trace the causal effects of the Orange Corners and OCIF programs. This can be done in at least two ways. First, when there is a large final group of high-quality applications (selected from the initial pool of applicants), to randomly select a group of participants, and track the non-selected as control group. Second, when such a “randomized control trial” design cannot be implemented, to treat the applicants that did make it into the bootcamp but not into the final selection as control group. With such a control group the career and business development of the control group can be used as the closest benchmark to separate selection and treatment effect.⁶⁶

⁶⁴ Orange Corners has EU-cooperation status. This offers possibilities to double the OC-budget although by adding the goals of an extra donor.

⁶⁵ Storey, D. (2017). *Six steps to heaven: Evaluating the impact of public policies to support small businesses in developed economies*. The Blackwell handbook of entrepreneurship, 176-193. OECD (2023), *Framework for the Evaluation of SME and Entrepreneurship Policies and Programmes 2023*, OECD Studies on SMEs and Entrepreneurship, OECD Publishing, Paris, <https://doi.org/10.1787/a4c818d1-en>.

⁶⁶ This is what we proposed initially in this study: we suggested to get as close as possible to such a control group with asking the implementing partners to provide us access to entrepreneurs that had been selected for the bootcamp preceding the Orange Corners programme but were not selected for the Orange Corners programme. Unfortunately, only the Nigerian implementing partner could provide

Currently entrepreneurial ecosystem mapping is used to contextualize the Orange Corners and OCIF programs. This is useful to get a first overview of the situation and potential stakeholders but is not enough for collective learning to improve the entrepreneurial ecosystem. For more effective evaluation at the ecosystem level, we recommend using more rigorous entrepreneurial ecosystem data for ex-ante diagnostics and ex-durante monitoring and ex-post evaluation. This data and the diagnostics, monitoring and evaluation could (should) also be shared with local stakeholders. Stakeholder engagement at the diagnostics phase can be used to enrich the diagnostics with local knowledge and to build legitimacy for partnerships. Stakeholder engagement at the monitoring and evaluation phases can be used to improve the local collective learning capacity for entrepreneurial ecosystem improvement and can also be used to better align the Orange Corner and OCIF programs with other entrepreneurial ecosystem players. This monitoring and evaluation could also show how the connectivity of the Orange Corners programmes is increased, for example with stimulating entrepreneurship at higher education institutes, connecting to local banks and investors, and the evolution of entrepreneurial communities and potentially leadership evolving out of the Orange Corners programmes.

The Orange Corners programs aim to contribute to achieving Sustainable Development at the societal level ("support innovative solutions to local challenges, that contribute to the UN Sustainable Development Goals"). In this study we could trace the sectors in which the businesses were active with the survey, and the interviews provided some more details on the nature of the business model. This provides some insight into how the businesses contribute to sustainable development. But, for more effective evaluation at the societal level we recommend to better trace the societal effects of the participating businesses, beyond financial and economic indicators. This could also include indicators of how the entrepreneurs and business contribute to improving the entrepreneurial ecosystem (for example with offering new trainings, new sources of finance and better transportation).

us access to this group. This comparison, based on just 5 entrepreneurs that did participate and 4 entrepreneurs that did not participate already provided many useful insights (see 5.3).

Appendix 1. Detailed research questions & research design

Detailed research questions

As outlined in section 1.2 the evaluation conducted focused on five central themes. More detailed research questions (20) were formulated for the five themes. These are indicated in Table 22. In this table we also indicate the relation between the different research questions and the research method(s) we have used to address them.

We have used a scoring system from zero (blank) to three to show the contribution of the research method towards answering the question. The number indication refers to the following: Score 0 (this research question cannot be answered using this research method, we leave the cells blank); Score 1 (this research question can possibly be partially answered by this research method); Score 2 (this research question can probably be answered mostly with this research method); Score 3 (this research question can be answered completely with this research method). We have used these questions to structure the report and will answer them systematically using the empirical evidence available. The answer to question 4 is included in chapters 4 and 5. Eventually, we did not have enough insights to answer question 6. Information on question 13 and 15 proved too thin/shallow to allow for proper answering these questions separately. The answers to questions 16 and 17 are combined.

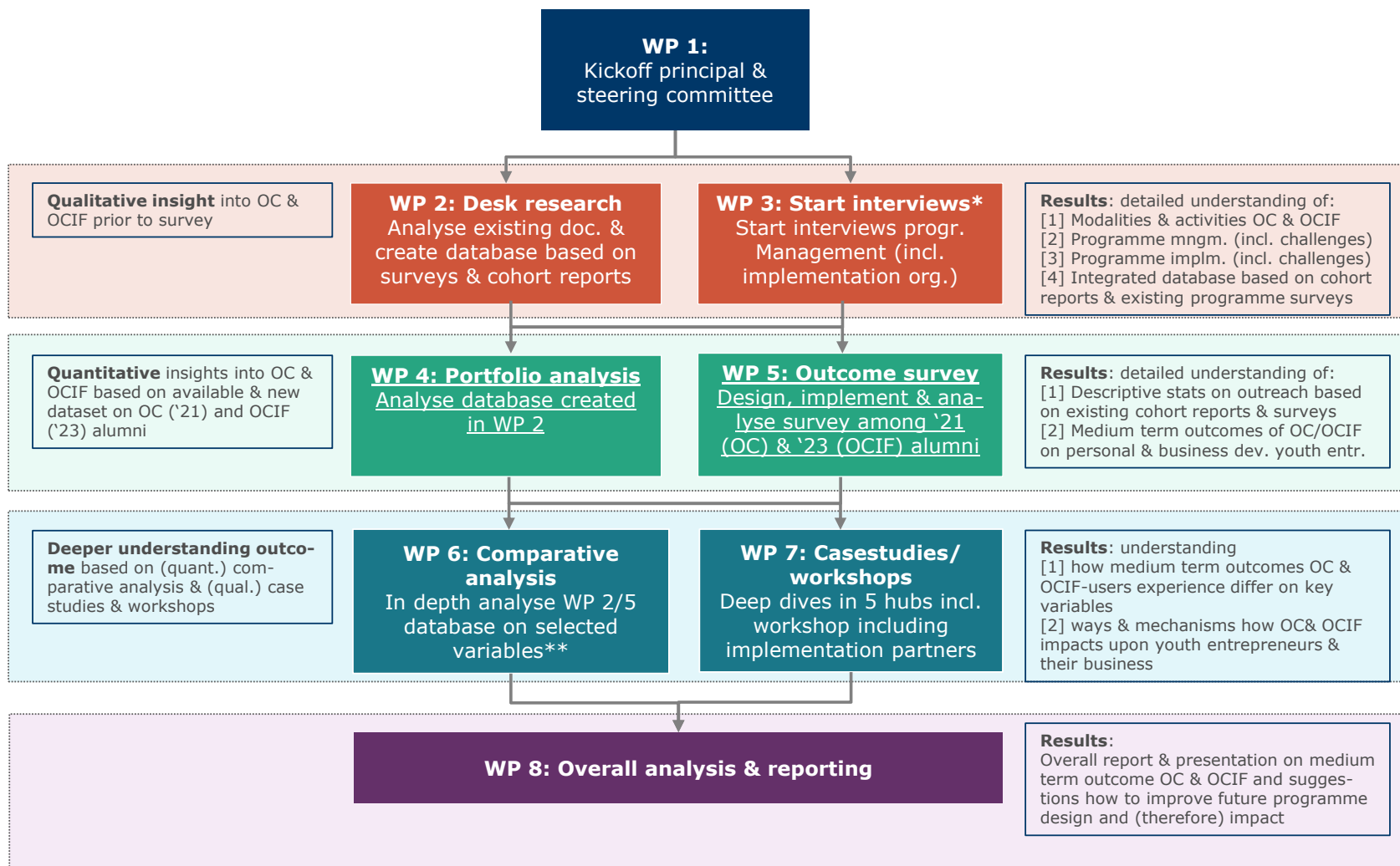
Detailed research design

The research design was included in section 1.3. We have divided our research approach into eight work packages (WPs) that are visualised in Figure 20 below. By combining and, where possible, comparing the findings from the different methods we created a thorough and multifaceted substantiation of our findings. Furthermore, this approach mitigates risks; if an analysis does not yield clear results in certain areas, findings from other research methods can still provide outcomes.

Table 22. The set of research questions that guided this evaluation, organised by theme

A. Outreach and variety in effect of the programmes		WP2 DSK RES.	WP3 INT VWS	WP4 PRT FOL.	WP5 SUR VEY	WP6 CMP. ANA	WP7 CASES /WS
<i>How many entrepreneurs participated in Orange Corners/OCIF and to what degree do effects of their participation differ of key variables (whole population and target group at which this outcome evaluation is focusing on)?</i>							
1.	How are participants (whole population & target group of this outcome evaluation) distributed in terms of location, sector, business stage, political context (political fragility of particular location) and gender.	2		3	1		1
2.	To what extent do effects of participation in Orange Corners/OCIF vary in terms of location, sector, business stage (see Q9), political context and gender (to be answered at the final stage of the analysis).			2	1	2/3	
B. Personal development		WP2	WP3	WP4	WP5	WP6	WP7
<i>How did Orange Corners alumni personally develop 3 years after following the Orange Corners training programme (and possibly also OCIF Track I, and 1 year after receiving OCIF Track II support), and what was the role of Orange Corners herein?</i>							
3.	Which skills and knowledge did alumni acquire during the Orange Corners training programme and which of these do alumni still use in their daily lives?	1	1		3		2
4.	What challenges were alumni facing on a personal level starting their business and to what extent did knowledge/skills gained from Orange Corners training programme help them to overcome these? What examples do alumni have in this context?	1	1		2 / 3		2
5.	What income have Orange Corners and OCIF participants been able to create (for themselves) since participating in the programme?		1		2 / 3		1
6.	To what extent has knowledge/skills gained by the entrepreneurs participating in Orange Corners/OCIF been passed on and diffused to a wider set of persons in their communities and how does this possible wider diffusion work? What examples do alumni have in this context?	1	1		2 / 3		1 / 2
7.	What are possible wider unintended effects of the Orange Corners/OCIF programmes on the personal development of the alumni (positive and negative)? What examples do alumni have in this context?	1	1		2 / 3		1 / 2
C. Business development		WP2	WP3	WP4	WP5	WP6	WP7
<i>How did businesses of entrepreneurs develop 3 years after following the Orange Corners programme and OCIF Tr. I, and 1 year after receiving OCIF Tr. II support, and what was the role of these programmes herein?</i>							
8.	How many entrepreneurs remain in business after 3 years? Is there a difference between the three subgroups discerned (Orange Corners only, Orange Corners + OCIF Tr. 1, Orange Corners + OCIF Tr. 1+2)?	1	1	1	2/3	2	1
9.	What business stage are (surviving) businesses that were supported through Orange Corners/OCIF in? Is there a difference between the three subgroups discerned (Orange Corners only, Orange Corners + OCIF Tr. 1, Orange Corners + OCIF Tr. 1+2)?	1	1	1	2/3		1
10.	What are the most significant changes these businesses have undergone in terms of: revenue growth, job creation, scaling opportunities (markets, products, locations), external financing and expansion of networks (clients, business partners, etc.)?	1	1	1	2/3		2
11.	To what extent does OCIF catalyse and/or extend these effects of the Orange Corners training programme on the businesses of alumni? Is there a difference between the three subgroups discerned (Orange Corners only, Orange Corners + OCIF Tr. 1, Orange Corners + OCIF Tr. 1+2)?	1	1		2 / 3		2
12.	What types of jobs and income have Orange Corners and OCIF participants (as firms) been able to create since participating in the programme?	2	1	1	2		2
13.	To what extent are alumni implementing strategies learned in Orange Corners and OCIF to ensure sustainability of their businesses?	1	1 / 2		2		2
14.	What are signs that Orange Corners and OCIF enabled young entrepreneurs to tackle local challenges?	1 / 2	1			2	2
15.	What are possible wider unintended effects of the Orange Corners/OCIF programmes on business development (positive & negative) of alumni and the wider community? What examples do alumni have?	1	1 / 2		2		3
D. Wider challenges entrepreneurial ecosystem and role of implementing organisations		WP2	WP3	WP4	WP5	WP6	WP7
16.	What particular challenges experience Orange Corners/OCIF-alumni and other stakeholders in the entrepreneurial ecosystem in which they operate? Do Orange Corners and OCIF address the most pressing challenges in the ecosystem??	1	1		2		2
17.	How do alumni and other stakeholders experience the role played by local implementation organisations?		1 / 2		2		2
E. Improvement & recommendations		WP2	WP3	WP4	WP5	WP6	WP7
18.	How can the design of Orange Corners or OCIF-instruments themselves be further improved? What elements are particularly effective and need strengthening? What elements are less effective? What elements are missing and could possibly be added?	1	1	1	2	2	2
19.	How can the way Orange Corners/OCIF are implemented be further improved?	1	1	1	2	2	2
20.	Which practical recommendations can be incorporated in a roadmap for the future development of Orange Corners and OCIF?	1	1	1	2	2	2





* If possible workshop with implementation organizations during The Hague connect days planned for July 2024

** In WP 4 we will assess feasibility& desirability– in consultation with principal to see whether a coupling of WP 2 and WP 5 databases have added value

Figure 20. Research design showing the eight work packages (WPs) and the expected results.



Appendix 2. RVO quarterly report and RVO Programma survey data

Given that there are two different overlapping instruments at play, being OC and specifically OCIF (Track I and II), we would ideally report on them separately. The quarterly reports and the RVO Programme survey did, however, not provide us with the means to do so. For the quarterly reports we only know whether OCIF *could be* obtained in that region, but the data does not distinguish between *participants* that did or did not obtain OCIF. Sporadically the number of startups that pitched for OCIF (and obtained OCIF) is mentioned in the responses to open questions, but this was mentioned too infrequent to be used overall. For the RVO Programme Survey we only received whether the incubate took part in OCIF I or II for the Luanda, Angola hub. For all other hubs this data was not available to us. All data presented from the sources below is therefore assumed to include both OC and OCIF. For Nigeria, Erbil and Senegal specific annual data has been received on specifically OCIF, but this was not enough for an overall overview of all OCIF-participating hubs.

RVO Quarterly reports data

The quarterly reporting forms are based on questionnaires sent out to the implementing partners every quarter of the year. Herein they have been asked about currently running programmes and specifics thereof, such as the number of participants.

Table 23 shows the responses for the quarterly reports within the years 2021 and 2022. Not all regions have submitted their response for every quarter. If we look at the reported programme status in every quarter (Table 24) it becomes clear that this can partly be attributed to the fact that simply no programme was running during that period in those regions. For every quarter the regions reported whether a programme started, ended or was running within that quarter. This overview of reported programme statuses is however not without its irregularities. Firstly, we observe programmes without a reported ending or start (see for example Maputo). Next to that, purely based on this data, there seem to be programmes that overlap.

Table 23. Responses by Orange Corners region. Source: Quarterly reports

Region	2021				2022			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Abidjan, Côte d'Ivoire	1	1	1	1	1		1	1
Accra, Ghana	1	1	1		1	1	1	1
Algiers, Algeria	1	1			1	1	1	
Baghdad, Iraq	1	1		1	1	1	1	1
Cairo, Egypt	1	1	1	1	1	1	1	1
Casablanca/Rabat, Morocco	1	1	1		2	2		
Darfur, Sudan			1					1
Erbil, KRI	1	1			1	1	1	1
Khartoum, Sudan	1	1	1			1	1	1
Kinshasa, DRC	1				1	1	1	1
Lagos, Nigeria		1			2	1		1
Luanda, Angola		1				1	1	1
Maputo, Mozambique	1	1					1	1
Upper Egypt, Egypt	1	1	1	1	1	1	1	1
Palestinian Territories					1	1	1	1
Johannesburg, South Africa						1		1
Dakar, Senegal							1	
Sport Orange Corners Morocco							1	
La Caravane Orange Corners Morocco							1	1
Total	11	12	7	4	13	14	15	15

Table 24. Reported programme status (green: started; clock: running; red: ended). Source: Quarterly reports

Region	2021				2022			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Abidjan, Côte d'Ivoire								
Accra, Ghana								
Algiers, Algeria								
Baghdad, Iraq								
Cairo, Egypt								
Casablanca/Rabat, Morocco								
Darfur, Sudan								
Erbil, KRI								
Khartoum, Sudan								
Kinshasa, DRC								
Lagos, Nigeria								
Luanda, Angola								
Maputo, Mozambique								
Upper Egypt, Egypt								
Palestinian Territories								
Johannesburg, South Africa								
Dakar, Senegal								
Sport Orange Corners Morocco								
La Caravane Orange Corners Morocco								

For this evaluation we are interested in programmes that started in 2021. This however poses an issue regarding the setup of the quarterly reports. The reports themselves are based on quarters of a years which are a different unit of analysis than a programme, which might run for multiple quarters. Figure 21 illustrates how quarterly reports might misalign with programmes. In that example, a quarterly report from Q1 might ask questions about the selection or application of participants as well questions about the graduation of participants in that quarter. The former two would then relate to programme 1 whereas the latter one in that reports would relate to programme 2.

We know, from administrative data, which regions have started a programme in 2021 and at what dates those programmes have started and ended (see Table 25). This table already

shows some reports are clearly missing or that questions have been reported for the wrong quarter (e.g. compare Ghana, Accra in Table 25 with Table 24).

To maintain this cohort scope (i.e. restricting ourselves to those started in 2021) in this analysis, we have applied a specific methodology of filtering the data:

1. Firstly, we only include reports from regions that are known to have started with a programme in 2021.
2. Then we apply a time range filter on the questions of those reports. Based on both whether a question pertains to a programme's start or ending, we decided if that question should be included in the analysis.

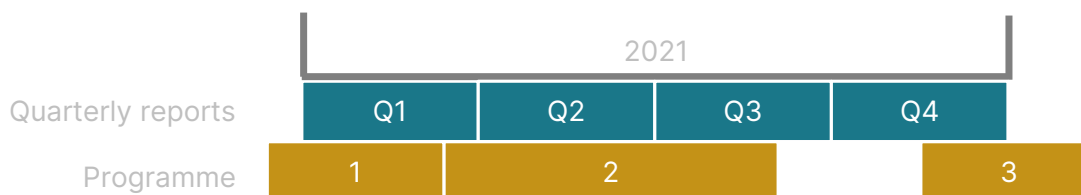


Figure 21. Fictional example of how quarterly reports and programme cohorts might differ

Table 25. Scope programme cohorts. Source: Quarterly reports

Country	Hub	Cohort number	Start	Finish
Algeria	Algiers	2	01/04/2021	01/10/2021
Angola	Luanda	4	01/11/2021	01/07/2022
Côte d'Ivoire	Abidjan	4	01/07/2021	01/12/2021
Côte d'Ivoire	Abidjan	5	01/12/2021	01/05/2022
Democratic Republic of the Congo	Kinshasa	3	01/05/2021	01/11/2021
Egypt	Cairo	1	01/01/2021	01/06/2021
Egypt	Cairo	2	01/07/2021	01/12/2021
Egypt	Upper Egypt	1	01/03/2021	01/08/2021
Egypt	Upper Egypt	2	01/09/2021	01/02/2022
Ghana	Accra	3	01/01/2021	01/07/2021
Ghana	Accra	4	01/10/2021	01/02/2022
Iraq	Baghdad	3	01/04/2021	01/10/2021
Iraq	Baghdad	4	01/11/2021	01/05/2022
Iraq	Erbil	3	01/05/2021	01/12/2021
Morocco	La Caravane	3	01/03/2021	01/09/2021
Morocco	La Caravane	4	01/11/2021	01/05/2022
Mozambique	Maputo	6	01/02/2021	01/07/2021
Mozambique	Maputo	7	01/07/2021	01/12/2021
Nigeria	Lagos	4	01/02/2021	01/07/2021
Nigeria	Lagos	5	01/07/2021	01/12/2021
South Africa	Johannesburg	5	01/06/2021	01/01/2022
Senegal	Dakar	2	01/06/2021	01/11/2021
Sudan	Khartoum	4	01/08/2021	01/03/2022

After applying this filter, we could obtain information about the number of participants within the cohort scope. Below, we have summarised those results in two tables (Table 26 and Table 27). Therein we show, differentiated by region and region fragility:

- How many rounds have started or finished for that region.
- The number of participants in that region and their gender for those who:
 - o Applied to the programme
 - o Were selected for the programme
 - o Graduated to the programme

Here we again notice some discrepancies. In theory, the number of rounds started within the scope should equal the number of rounds finished. Since this is clearly not always the case, some regions probably did not manage to submit a report within a specific quarter. The implication hereof is that the other statistics provided below are probably incomplete for those regions.

Table 26. Overview programme participation by Orange Corners region. Source: Quarterly reports

Region	OCIF region	Rounds started	Rounds finished	Applied	Applied % female	Selected	Selected % female	Finished	Finished % female
Algeria, Algiers	No	1	0	243	40%	15	50%	0	
Angola, Luanda	No	0	1	0		0		10	20%
Côte d'Ivoire, Abidjan	Yes	2	1	363	47%	23	48%	17	35%
DRC, Kinshasa	No	0	0	0		0		0	
Egypt, Cairo	No	2	2	214	42%	88	52%	15	67%
Egypt, Upper Egypt	No	2	2	449	39%	38	58%	35	54%
Ghana, Accra	Yes	1	2	0		0		15	33%
Iraq, Baghdad	Yes	2	2	550	25%	42	36%	40	35%
KRI, Erbil	Yes	1	0	97	27%	17	24%	0	
Morocco, Casablanca/Rabat	Yes	1	3	275	43%	15	33%	42	43%
Morocco, La Caravane Orange Corners	Yes	0	0	0		0		0	
Mozambique, Maputo	Yes	1	0	385	35%	35	31%	0	
Nigeria, Lagos	Yes	0	0	0		0		0	
Senegal, Dakar	Yes	0	0	0		0		0	
South Africa, Johannesburg	No	0	0	0		0		0	
Sudan, Khartoum	Yes	1	0	2.535	39%	21	48%	0	
Grand Total		14	13	5.111	38%	294	45%	174	43%

Table 27. Overview programme participation by fragility of the Orange Corners region. Source: Quarterly reports

Fragility	Rounds started	Rounds finished	Applied % female	Selected % female	Finished % female
N	14	13	5.111	294	174
None	7	9	41%	52%	49%
Other fragile	3	2	41%	38%	30%
Extremely fragile	4	2	36%	36%	35%

The quarterly reports have also asked for possibilities for improvement. Even though these challenges may differ across regions, we have summarised them below. In this open question the following themes can be identified among the answers:

1. **Engagement issues:** speaker selection, relevance for masterclasses, difficulty in attracting and retaining new (female; for some regions) incubates, engaging competent mentors, low attendance due to external factors (elections, currency changes, cash crunch, petrol scarcity)
2. **Technical issues:** limited internet accessibility in remote regions
3. **Organisational issues:** improve communication with applicants, specifically w.r.t selection process and the programme goals, scheduling issues (esp. towards the end of the cohort)
4. **Financial issues:** attracting private partners, limited access to finance for young entrepreneurs

RVO Programme Survey data

The second data source for the portfolio analysis is the RVO Programme survey data. This survey has been sent out to incubatees. To apply our cohort scope, only responses of incubatees who started in 2021 have been included in this analysis. To follow incubatees over time, multiple surveys have been sent out per participant. There are at most three waves per participant:

- 1. Pre-programme
- 3. After graduation
- 4. A year after graduation

This survey is a separate source of data next to the quarterly reports; therefore, region denominations may differ between these sources. By applying the scope-filter to both sources, we strive to align the underlying samples. Nevertheless, the results between these sources will still differ, as not all incubatees have responded to the survey. Concerning that, we notice quite some disparity (e.g. Mozambique, Ghana) between the number of respondents per region and the number of selected participants. The results we present below are therefore not completely representative for the overall population of participants.

Below, in Table 28, we show the number of responses per region. In total there are 614 observations (excluding duplicates) for a total of 454 respondents. In the most ideal case, the number of observations would have been triple that of the respondents, hinting at a disparity in response across the waves. In Table 29, we show the surveys response per wave. Generally, we observe a decline in the response rate over time (i.e. later waves have a low response rate). Since we count unique persons, the overall grand total does not equal the sum of the other columns or all rows.

Table 28. Number of responses. Source: Programme survey

Country	Region	Responses	Unique persons
Algeria	(not reported)	3	3
Angola	Luanda	7	7
Democratic Republic of the Congo	Kinshasa	15	12
Egypt	(not reported)	15	15

Egypt	Cairo	85	70
Egypt	Upper Egypt	86	52
Ghana	(not reported)	2	2
Ghana	Accra	49	47
Iraq	Baghdad	80	54
Ivory Coast	Abidjan	4	4
Kurdistan Region	(not reported)	5	5
Morocco	La Caravane	18	14
Mozambique	Maputo	144	84
Nigeria	Lagos	79	77
South Africa	Johannesburg	14	14
Sudan	Khartoum, Sudan	15	15
Grand Total		621	461

Table 29. Number of respondents (unique persons) per wave. Source: Programme survey

Country	Region	Pre-pro-gramme	Gradu-ation	Year after	Unique persons
Algeria	(not re-ported)			3	3
Angola	Luanda	7			7
Democratic Republic of the Congo	Kinshasa	5	10		12
Egypt	(not re-ported)			15	15
Egypt	Cairo	60	25		70
Egypt	Upper Egypt	37	35	14	52
Ghana	(not re-ported)			2	2
Ghana	Accra	31	14	4	47
Iraq	Baghdad	43	37		54
Ivory Coast	Abidjan			4	4
Kurdistan Region	(not re-ported)			5	5
Morocco	La Cara-vane	14	4		14
Mozambique	Maputo	60	64	20	84
Nigeria	Lagos	40	39		77
South Africa	Johannes-burg	7	7		14
Sudan	Khartoum, Sudan	15			15

Grand Total	319	235	67	461
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Based on the responses above, the survey allows us to explore certain backgrounds characteristics of the participants, specifically gender, age, business stage, sector and financing source. With regards to gender (Figure 22) we observe a higher percentage of male participants (58% against 42% female). This closely resembles the results of the quarterly reports, yet here we see a lower female response. Most participant tend to be between 20 and 35 years old, with a sharp decline after the age of 35 (Figure 22). Female participants, however, seem to be generally younger than their male counterparts.

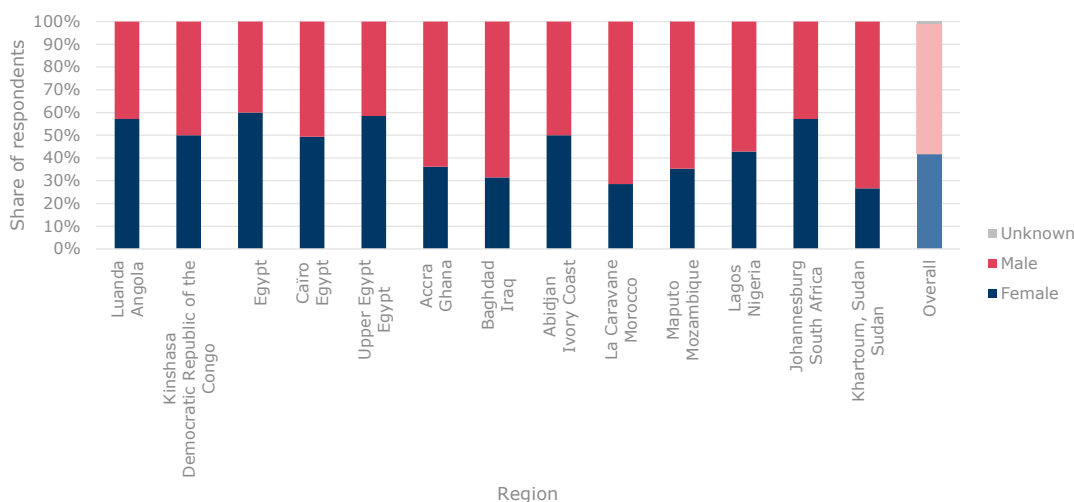


Figure 22. Distribution of gender among participants. Source: Programme survey

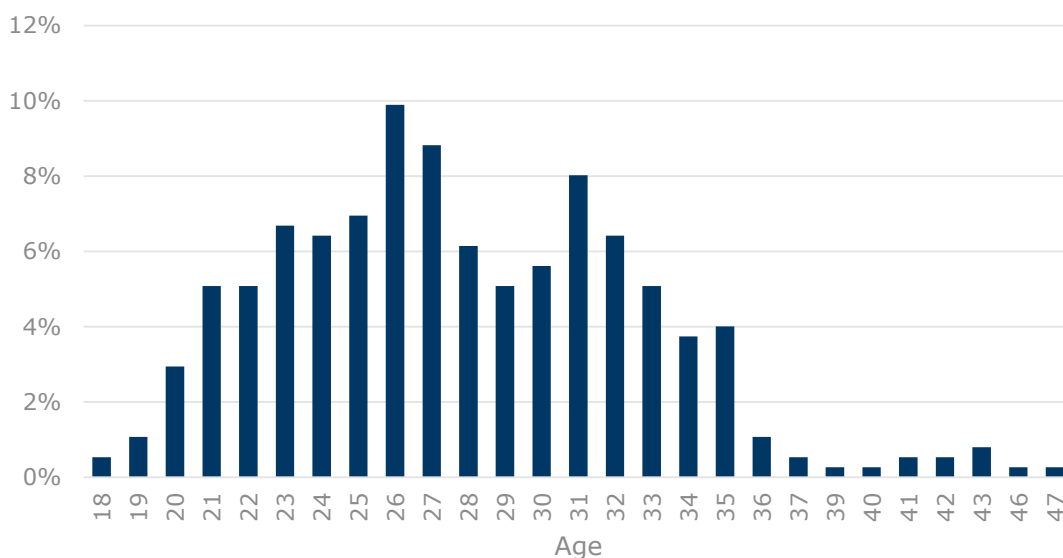


Figure 23. Distribution of age. Source: Programme survey

Moving to their entrepreneurial activities, it appears that business mature throughout the programme, as higher business stages have been reported in later survey waves (Table 30). However, we do need to keep the receding response in later waves in mind. Respondents

could choose multiple options with regards to their business stage, but for the analysis we've ordered them and only considered the highest chosen by a respondent. Regarding sector (Table 31), most participants appear to be active in agriculture, ICT, and health, food, drinks and entertainment. Interestingly, this is different for Iraq (

Table 32), where the focus lies on health, safety, ICT and business services. Most participants report that they're mostly financed through family or friends or national funding (Table 33). Financing was mostly obtained in the form of a loan, but they turned to subsidy or grants as participants graduated (Table 34). The businesses of participants had an average of 5 employees, ranging from 1 to bigger businesses with 35 employees (Table 35). On average, just below half of those employees are female (

Table 44)

Table 30. Distribution of business stage per survey wave (red to green, share of that stage within wave). Source: Programme survey

Highest business stage reached	Pre-programme	Graduation	Year after	Overall
Unknown	64	17	15	96
An idea with concrete plans to start	41	27	9	77
Validation/MVP (Minimum Viable Product)	25	4	1	30
Prototype has been built	40	34	8	82
Business officially registered	18	28	3	49
Business has a product on the market	15	9	3	27
Business has first paying customers	37	49	11	97
Business has many paying customers	32	26	4	62
Business is making profit	47	41	13	101
Overall	319	235	67	621

Table 31. Distribution of sector (red to green, share of that stage). Source: Programme survey

Sector	Number of responses
Agriculture	128
Chemical, Pharmaceutical	13
Construction, Architecture	18
Education	57
Energy	35
Engineering	37
Finance	19
Food, Drinks, Entertainment	55
Health, Safety	59
Internet and Communication Technology (ICT)	77
Media, Culture, Graphic	25
Oil, Gas, Mining	7
Professional / Business services	41
Textile, Clothing	30
Tourism	12
Transport, Logistics	22
Water	16

Table 32. Distribution of sector, selection of high response countries (red to green, share of that sector within that country). Source: Programme survey

Sector	Egypt	Ghana	Iraq	Mozambique	Nigeria
Agriculture	30	18	5	29	32
Chemical, Pharmaceutical	2	4	4	1	0
Construction, Architecture	2	1	4	6	2
Education	19	1	7	14	5
Energy	7	3	2	6	13
Engineering	7	0	7	9	3
Finance	3	0	1	9	1
Food, Drinks, Entertainment	8	11	11	15	3
Health, Safety	8	4	19	13	9
Internet and Communication Technology (ICT)	18	1	22	18	4
Media, Culture, Graphic	1	2	4	10	2
Oil, Gas, Mining	0	0	2	3	0
Professional / Business services	3	0	13	9	1
Textile, Clothing	14	5	3	4	3
Tourism	3	0	6	0	0
Transport, Logistics	8	2	2	3	1
Water	4	0	2	2	3

Table 33. Distribution of source of financing, all regions (red to green, share of that source within the wave). Source: Programme survey

Source of financing	Pre-programme	Graduation	Year after	Grand Total
Commercial bank/institute	8	1	1	10
Micro-credit bank/institute	2	2	1	5
Government	9	3	2	14
International organisation	15	11	0	26
National organisation	22	14	1	37
Venture capitalist	2	3	0	5
Angel investor	9	6	1	16
Corporate investment funds	1	2	1	4
Family and/or friends	77	32	5	114

Table 34. Distribution of type of financing, all regions (red to green, share of that type within the wave). Source: Programme survey

Type of financing	Pre-pro-gramme	Grada-tion	Year af-ter	Grand To-tal
A loan (e.g. from a bank or a family member)	10	10	1	21
A grant or subsidy	7	19	3	29
An investment for equity	3	4	1	8
Other (financing type)	0	1	0	1

Table 35. Number of employees. Source: Programme survey

Country	Region	Average number of employees	% female	Number of responses
Algeria	(not reported)	1.0	100%	2
Angola	Luanda	3.3	67%	3
Democratic Republic of the Congo	Kinshasa	4.1	30%	10
Egypt	(not reported)	1.3	100%	3
Egypt	Cairo	5.2	54%	31
Egypt	Upper Egypt	4.5	55%	26
Ghana	(not reported)	6.5	100%	2
Ghana	Accra	8.0	48%	49
Iraq	Baghdad	4.3	38%	45
Ivory Coast	Abidjan	4.3	50%	3
Morocco	La Caravane	6.0	39%	3
Mozambique	Maputo	3.7	38%	39
Nigeria	Lagos	3.1	48%	53
South Africa	Johannesburg	1.8	37%	5
Grand Total		4.7	47%	274

Appendix 3. Additional tables and figures chapter 3 and 5

Table 36. Overview of reported programme participation in 2021 by region. Source: Quarterly reports⁶⁷

Region	Rounds started	Rounds finished	Applied	Selected	Finished
Algeria, Algiers	1	0	243	15	0
Angola, Luanda	0	1	0	0	10
Côte d'Ivoire, Abidjan	2	1	363	23	17
Egypt, Cairo	2	2	214	88	15 ⁶⁸
Egypt, Upper Egypt	2	2	449	38	35
Ghana, Accra	1	2	0	0	15
Iraq, Baghdad	2	2	550	42	40
KRI, Erbil	1	0	97	17	0
Morocco, Casablanca/Rabat	1	3	275	15	42 ⁶⁹
Mozambique, Maputo	1	0	385	35	0
Sudan, Khartoum	1	0	2.535	21	0
Grand Total	14	13	5.111	294	174

⁶⁷ This data based on the quarterly reports is far from perfect for various reasons. We have obtained no data for the following regions: Lagos (Nigeria), Dakar (Senegal), Johannesburg (South Africa), La Caravane (Morocco), Kinshasa (DRC). This shows that the quantitative data is incomplete. This was signalled and intermediate results were shared. On these occasions we have mentioned that data were incomplete. Further cohorts that started in 2021 are not always included in 2021 e.g. if they finalise in 2022. We corrected for the latter as explained when discussing figure 20 in appendix 2 where we gave a fictional example of how quarterly report and programme cohorts might differ.

⁶⁸ This sharp decline is because Cairo had a pre-incubation programme and therefore differs from the other regions.

⁶⁹ This figure is a clear indication of the gaps in the data. It shows that Casablanca has a success rate of 280% (!). Out of the 15 selected applications, 42 have completed the programme.

Table 37. Number of survey responses per region for participants that started in 2021 (n unique persons =461). Source: Programme survey

Country	Region	Responses	Unique persons
Algeria	(not reported)	3	3
Angola	Luanda	7	7
Democratic Republic of the Congo	Kinshasa	15	12
Egypt	(not reported)	15	15
Egypt	Cairo	85	70
Egypt	Upper Egypt	86	52
Ghana	(not reported)	2	2
Ghana	Accra	49	47
Iraq	Baghdad	80	54
Ivory Coast	Abidjan	4	4
Iraq	Kurdistan Region	5	5
Morocco	La Caravane	18	14
Mozambique	Maputo	144	84
Nigeria	Lagos	79	77
South Africa	Johannesburg	14	14
Sudan	Khartoum, Sudan	15	15
Grand Total		621	461

Table 38. Distribution of respondents of our survey (n=159). Source: Dialogic survey

Country	Respondents	Percentage of survey sample
Egypt	30	19%
Mozambique	21	13%
Côte d'Ivoire	19	12%
Nigeria	18	11%
Iraq (Baghdad & Kurdistan region)	14	9%
Morocco	14	9%
South Africa	12	8%
Democratic Republic of Congo	10	6%
Sénégal	6	4%
Algeria	5	3%
Ghana	5	3%
Sudan	3	2%
Angola	2	1%
Grand Total	159	100%

Table 39. Distribution of sector (n=651). For four countries we have enough respondents to show them separately. Source: Programme survey.

Sector	Egypt	Ghana	Iraq	Morocco	Mozam- bique	Nigeria	Total
N	137	51	80	38	144	79	651
Agriculture	22%	35%	4%	11%	19%	39%	20%
Chemical, Phar- maceutical	1%	8%	4%	0%	1%	0%	2%
Construction, Ar- chitecture	1%	2%	4%	3%	4%	2%	3%
Education	14%	2%	6%	3%	9%	6%	9%
Energy	5%	6%	2%	5%	4%	16%	5%
Engineering	5%	0%	6%	21%	6%	4%	6%
Finance	2%	0%	1%	0%	6%	1%	3%
Food, Drinks, En- tertainment	6%	21%	10%	5%	10%	4%	8%
Health, Safety	6%	8%	17%	5%	9%	11%	9%
Internet and Communication Technology (ICT)	13%	2%	19%	18%	12%	5%	12%
Media, Culture, Graphic	1%	4%	4%	0%	7%	2%	4%
Oil, Gas, Mining	0%	0%	2%	0%	2%	0%	1%
Professional / Business services	2%	0%	11%	13%	6%	1%	6%
Textile, Clothing	10%	10%	3%	0%	3%	4%	5%
Tourism	2%	0%	5%	5%	0%	0%	2%
Transport, Logis- tics	6%	4%	2%	8%	2%	1%	3%
Water	3%	0%	2%	3%	1%	4%	2%

Table 40. Overview of gender distribution by region. Source: Quarterly reports

Region	Applied % female	Selected % female	Finished % female
Algeria, Algiers	40%	50%	
Angola, Luanda			20%
Côte d'Ivoire, Abidjan	47%	48%	35%
Egypt, Cairo	42%	52%	67%
Egypt, Upper Egypt	39%	58%	54%
Ghana, Accra			33%
Iraq, Baghdad	25%	36%	35%
KRI, Erbil	27%	24%	
Morocco, Casablanca/Rabat	43%	33%	43%
Mozambique, Maputo	35%	31%	
Sudan, Khartoum	39%	48%	
Grand Total	38%	45%	43%

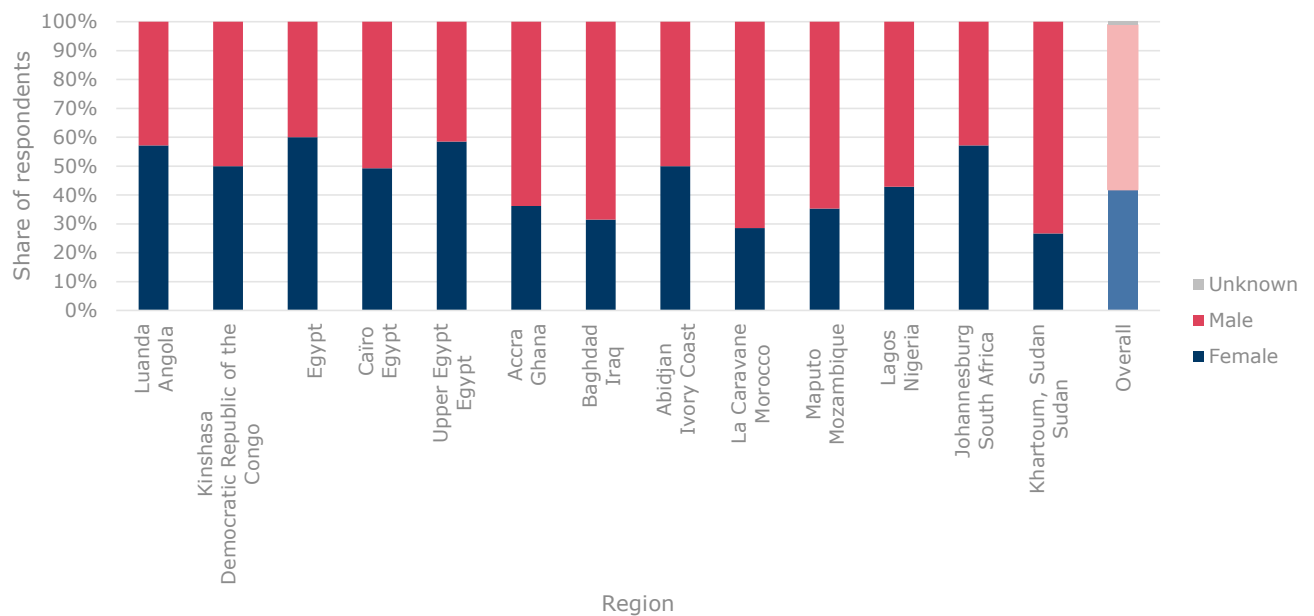


Figure 24. Gender distribution per region (n unique persons=461). Source: Programme survey

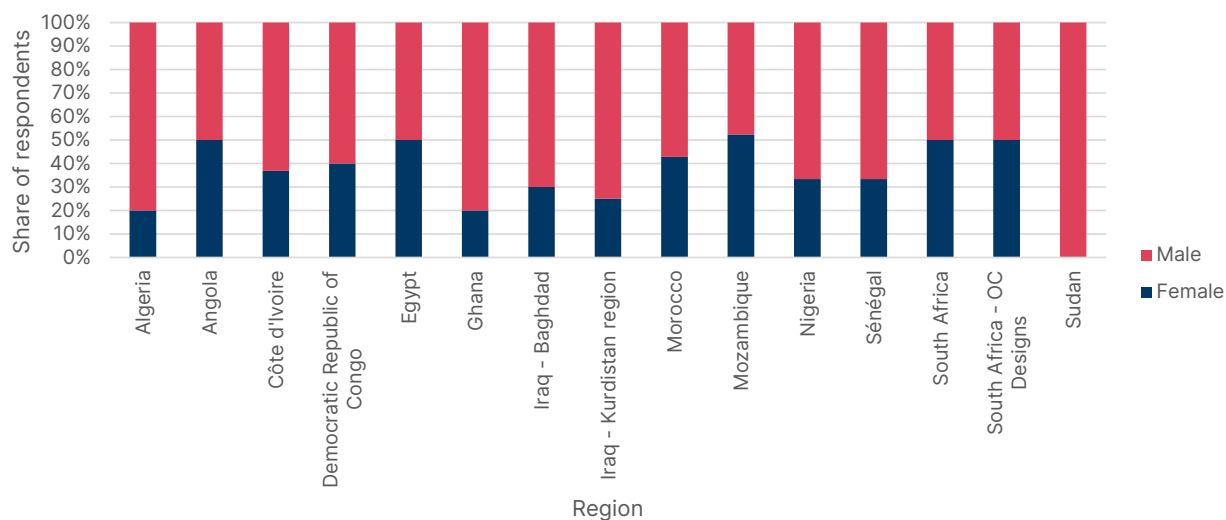


Figure 25. Gender distribution per region (n=159). Source: Dialogic survey

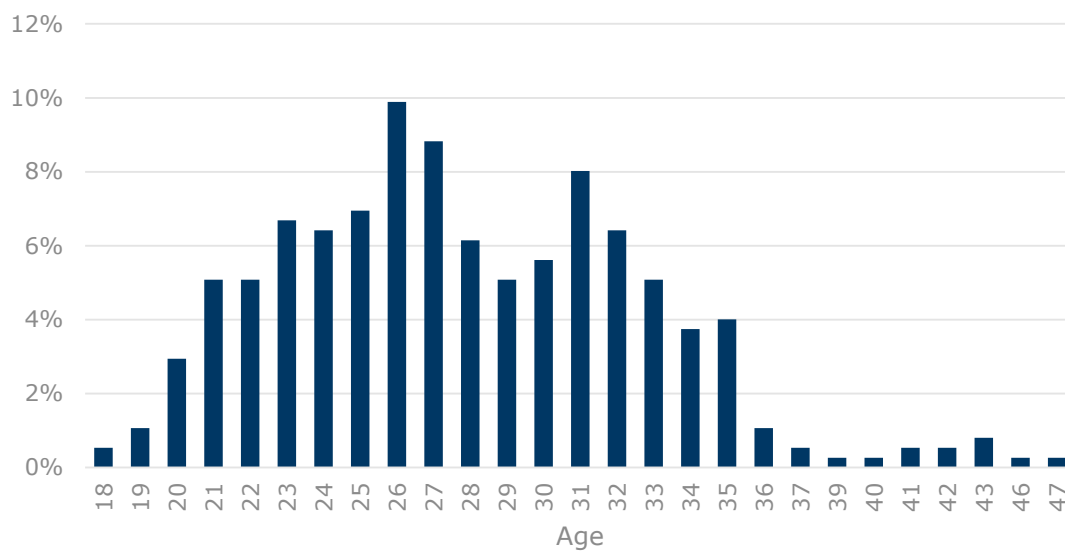


Figure 26. Distribution of age by gender (n=532). Source: Programme survey

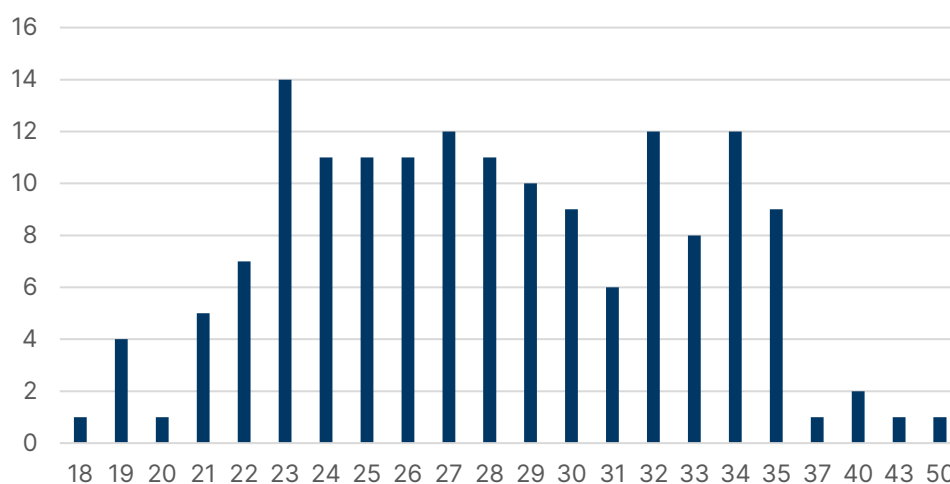


Figure 27. Age of survey respondents (n=159). Source: Dialogic survey.

Table 41. Respondents' characteristics per Orange Corners region (n=159). Source: Dialogic survey.

Orange Corners region	N	Average age
Algeria	5	31,2
Angola	2	27,0
Côte d'Ivoire	19	33,4
Democratic Republic of Congo	10	29,8
Egypt	30	32,6
Ghana	5	36,2
Iraq - Baghdad	10	32,3
Iraq - Kurdistan region	4	30,0
Morocco	14	31,6
Mozambique	21	29,4
Nigeria	18	33,1
Senegal	6	30,2
South Africa	10	35,3
South Africa - Orange Corners Designs	2	42,0
Sudan	3	28,3
Total	159	32

The table below is referred to in chapter 5.

Firm	Year founded	Fte 2021	Fte 2023	Turnover 2020 (NN)	Turnover 2023 (NN)	Turnover per fte (NN)	Turnover per fte (euro)
OC participant-firms	2021	1,00	3,50	0	35.000.000	10.000.000	5624
	2020	4,5	0,0	178.400	0	0	0
	2019	2,75	7,75	6.459.000	38.000.000	4.903.226	2758
	2017	10,25	11,00	970.000	160.770.905	14.615.537	8220
	2019	6,00	29,00	3.000.000	51.000.000	1.758.621	989
	average	4,90	10,25	2.121.480	56.954.181	6.255.477	3518
			2,09		26,85		
Bootcamp only-firms							
	2018	2,50	3,00	259.500	1.000.000	333.333	187
	2019	1,75	8,25	0	7.000.000	848.485	477
	2020	0,75	4,00	0	18.000.000	4.500.000	2531
	2019	1,75	3,25	2.000.000	8.000.000	2.461.538	1384
	average	1,69	4,63	564.875	8.500.000	2.035.839	1145
			2,74		15,05		

Table 42. Comparative analysis of businesses Nigerian participants full Orange Corner program and bootcamp-only

Appendix 4. Overview interview respondents

Type	Function	Affiliation	Country
Policy	Senior policy officer innovation	BZ	Netherlands
Policy	Cluster coordinator youth employment policies	BZ	Netherlands
Policy	Programme coordinator OC	RVO	Netherlands
Policy	Programme coordinator OCIF	RVO	Netherlands
Policy	Team manager private sector development	RVO	Netherlands
Policy	Programme advisor Iraq & Palestinian Territories	RVO	Netherlands
OCIF implementor	Project manager OCIF, sr. investment manager	GroFin	Erbil (Kurdistan region Iraq)
Former implementor	Programme lead OC	Mselect	Erbil (Kurdistan region Iraq)
OC implementor	Grand and reporting coordinator OC	51 Labs	Erbil (Kurdistan region Iraq)
OCIF implementor	Fund manager OCIF, investment manager	GroFin	Erbil (Kurdistan region Iraq)
Policy	Economic policy officer	Dutch consulate in Erbil	Erbil (Kurdistan region Iraq)
OC implementor	Managing director 51 Labs	51 Labs	Erbil (Kurdistan region Iraq)
OC alum	OC and OCIF Track I & II		Erbil (Kurdistan region Iraq)
OC alum	OC and OCIF Track I		Erbil (Kurdistan region Iraq)
OC alum	OC and OCIF Track I		Erbil (Kurdistan region Iraq)
OC alum	OC and OCIF Track I		Erbil (Kurdistan region Iraq)

OC alum	OC and OCIF Track I		Erbil (Kurdistan region Iraq)
Control group	Consultant		Erbil (Kurdistan region Iraq)
OC and OCIF implementor	Managing director Bidaya	Bidaya	Morocco
OC and OCIF implementor	Head of incubation	Bidaya	Morocco
OC and OCIF implementor	Funds manager, Finance administration OCIF	Bidaya	Morocco
OC alum	OC and OCIF Track I		Morocco
OC alum	OC and OCIF Track I & II		Morocco
OC alum	OC and OCIF Track I & II		Morocco
OC alum	OC and OCIF Track I & II		Morocco
OC alum	OC and OCIF Track I		Morocco
Stakeholder / OC alum			Morocco
Stakeholder / OC trainer			Morocco
Stakeholder	Cluster manager		Morocco
Stakeholder			Morocco
Stakeholder			Morocco
Stakeholder		Embassy of the Netherlands	Morocco
Stakeholder / former OC implementor			Morocco
Stakeholder		Support center for entrepreneurship and local economic development	Morocco
Stakeholder			Morocco
Stakeholder	Ambassador	Embassy of the Netherlands	Morocco
Stakeholder	Consultant	INSKIP Entrepreneurs	Morocco

Stakeholder	Entrepreneur / investor / academic	Adalia Institute	Morocco
Stakeholder	Academic	Universite Hassan II	Morocco
Stakeholder	Academic	Universite Hassan II	Morocco
OC and OCIF implementor	Sr. programme manager and head start-up youth enterprise, supporting OC	FATE Foundation	Nigeria
OC and OCIF implementor	Dean and Director Fate School and Foundation	FATE Foundation	Nigeria
OC and OCIF implementor	Support coordinator and impact measurement OC	FATE Foundation	Nigeria
OC and OCIF implementor	Sr. programme manager scale up lab, supporting OCIF	FATE Foundation	Nigeria
OC and OCIF implementor	Country manager OC	FATE Foundation	Nigeria
OC and OCIF implementor	Fund manager OCIF	FATE Foundation	Nigeria
OC and OCIF implementor	Incubation programme manager	FATE Foundation	Nigeria
OC and OCIF implementor	Director	FATE Foundation	Nigeria
OC alum	OC and OCIF Track I & II		Nigeria
OC alum	OC and OCIF Track I		Nigeria
OC alum	OC and OCIF Track I		Nigeria
OC alum	OC and OCIF Track I		Nigeria
OC alum	OC and OCIF Track I		Nigeria
Control group	Bootcamp only		Nigeria
Control group	Bootcamp only		Nigeria
Control group	Bootcamp only		Nigeria
Control group	Bootcamp only		Nigeria
Stakeholder		Consulate General of the Kingdom of	Nigeria

		the Netherlands, Lagos	
Stakeholder / OC alum		Integrated Aerial Precision	Nigeria
Stakeholder / OC alum		Materials Pro	Nigeria
Stakeholder		Officelord	Nigeria
Stakeholder		Uni Lagos Business School	Nigeria
Stakeholder		Pinnacle Business Solutions	Nigeria
Stakeholder			Nigeria
Stakeholder	Head of startup support	Co-creation Hub (CcHUB)	Nigeria
Stakeholder	Investor	Verod Capital	Nigeria
Stakeholder	Consultant	MarketSight Consultancy	Nigeria
Stakeholder	Deputy Consul General	Consulate General of the Kingdom of the Netherlands, Lagos	Nigeria
Stakeholder	Consul General	Consulate General of the Kingdom of the Netherlands, Lagos	Nigeria
OC implementor	Lead trainer OC	Pitch Palavre	Senegal
OCIF implementor	Manager OCIF	INCO	Senegal
OC alum	OC and OCIF Track I & II		Senegal
OC alum	OC and OCIF Track I		Senegal
OC alum	OC and OCIF Track I		Senegal
OC alum	OC and OCIF Track I & II		Senegal
OC alum	OC and OCIF Track I & II		Senegal
OC implementor	Co-founder and business developer, implementing OC Upper Egypt	Outreach Egypt	Egypt
OC implementor	Project coordinator	Outreach Egypt	Egypt

OC implementor	Trainer	Outreach Egypt	Egypt
OC alum	OC		Egypt
OC alum	OC		Egypt
OC alum	OC		Egypt
OC alum	OC		Egypt
OC alum	OC		Egypt
OC alum	OC		Egypt
Stakeholder	Director	AUC Center for Entrepreneurship and Innovation (CEI)	Egypt
Stakeholder	Associate Professor of Operations Management	AUC School of Business	Egypt
Stakeholder	Program Manager	AUC Center for Entrepreneurship and Innovation (CEI)	Egypt
Stakeholder	Program Officer	AUC Center for Entrepreneurship and Innovation (CEI)	Egypt
Stakeholder	Program Officer, Women on Boards Observatory	AUC Center for Entrepreneurship and Innovation (CEI)	Egypt
Stakeholder	Director	VLab AUC	Egypt
Stakeholder		Egypt Entrepreneurship and Innovation Center, National Institute for Governance and Sustainable Development (NIGSD)	Egypt
Stakeholder	Investor	UI Investments	Egypt
Stakeholder	President	Women Entrepreneurs Network	Egypt
Stakeholder	Entrepreneur	ICareer	Egypt
Stakeholder	Entrepreneur / Board member	ICE Alex / Afrilabs	Egypt
Stakeholder	Executive Director	ISF, MOHESR	Egypt
Stakeholder	CEO	Enroot	Egypt
Stakeholder	Chairman & CEO / Founder & IP owner	Gemini Africa / CinemaTech	Egypt
Stakeholder	Senior Research Project Manager for Global Entrepreneurship Monitor	AUC	Egypt

Stakeholder

CEO & Founder

Carerha

Egypt

Appendix 5. Survey

To acquire more information regarding personal development and business development after completion of the Orange Corners program, a survey was set out during the duration of this evaluation. In the survey all Orange Corners cohorts from 2021 were included. To increase the response rate, the survey was made available in the following languages: Arabic, English, French, Kurdish, and Portuguese. Alumni received a single email containing links to the various translations of the survey. They were able to choose for themselves in which language they completed the questionnaire. The survey was sent to 508 Orange Corners/OCIF alumni, of which 159 completed the survey (a response rate of 32%). Various reminders were sent to acquire more responses.

In the survey various background questions were included to be able to explore certain background characteristics of respondents, and their businesses. In this appendix, we compare some of these background characteristics of survey respondents with the background characteristics of program survey respondents. This gives an insight into the strength of the bias in the results. 'Satisfied' users are generally more willing to participate in follow-up research. This can lead to a positive sampling bias. By examining the background characteristics of the respondents from both surveys, we can map out to what extent the samples differ.

Most respondents (58%) were only part of the Orange Corners track. 36% of the respondents were additionally part of either OCIF track 1 (29%) or OCIF track 2 (7%). Ten respondents (6%) were part of all Orange Corners/OCIF tracks.

As shown in Figure 28, there is a slight bias in the age of respondents to the Dialogic survey compared to the RVO-survey, shown in Figure 22. Respondents to the Dialogic survey tend to be older than those who have responded to the RVO-survey. Respondents to the Dialogic survey were on average 32 years old as of January 1st, 2021.

Table 43 shows the mean age per Orange Corners region.

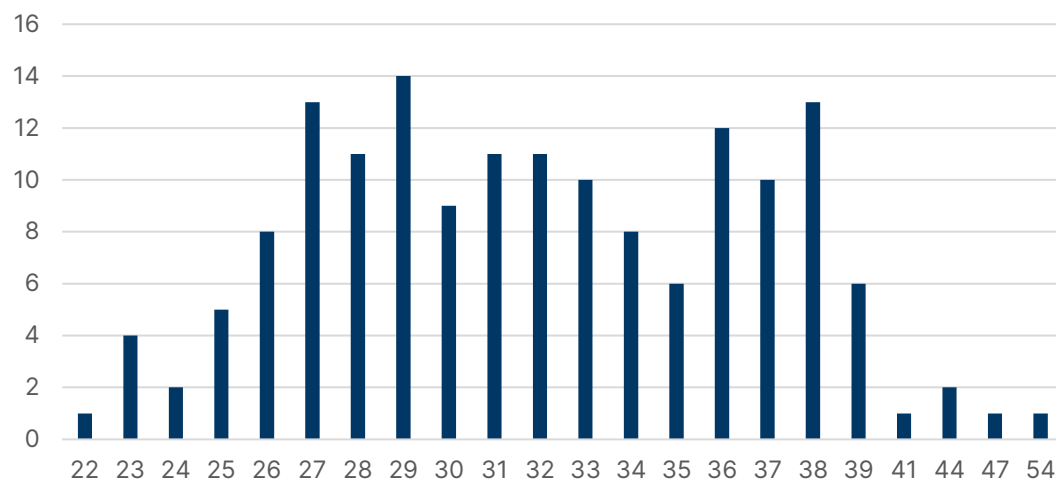


Figure 28. Age of survey respondents (n=159). Source: Dialogic survey.

Table 43. Mean age of survey respondents per track (n=159). Source: Dialogic survey.

Track	Average age as of January 1 st 2021
Only OC	27,9
OC + OCIF Track I	28,6
OC + OCIF Track II	29,7
OC + OCIF Track I + Track II	27,4

Similarly, the respondents to the Dialogic survey differ slightly from the other data sources in terms of gender. We see that 40% of respondents were female, whereas this percentage was higher for the other data sources, as shown in

Table 44.

Table 44. Percentage of female respondents per data source

Data source	% female
Quarterly reports	45%
RVO-survey	42%
Dialogic survey	40%

The respondents to the Dialogic survey have participated in 15 different Orange Corners region hubs. Table 45 shows the number of responses per Orange Corners region, the percentage female respondents and the average age of respondents.

Table 45. Respondents' characteristics per Orange Corners region (n=159). Source: Dialogic survey.

Orange Corners region	N	% female	Average age
Algeria	5	20%	31,2
Angola	2	50%	27,0
Côte d'Ivoire	19	37%	33,4
Democratic Republic of Congo	10	40%	29,8
Egypt	30	50%	32,6
Ghana	5	20%	36,2
Iraq - Baghdad	10	30%	32,3
Iraq - Kurdistan region	4	25%	30,0
Morocco	14	43%	31,6
Mozambique	21	52%	29,4
Nigeria	18	33%	33,1
Sénégal	6	33%	30,2
South Africa	10	50%	35,3
South Africa - Orange Corners Designs	2	50%	42,0
Sudan	3	0%	28,3

Aside from background characteristics respondents were asked to rate themselves on their level of experience with the industry, leadership skills and business owner skills before they started their business and participated in the programme. As mentioned in chapter 0 females rated themselves lower than males on each category. *Figure 29* shows that for each skill category, a larger proportion of women indicate having no or limited experience with the skill compared to men.

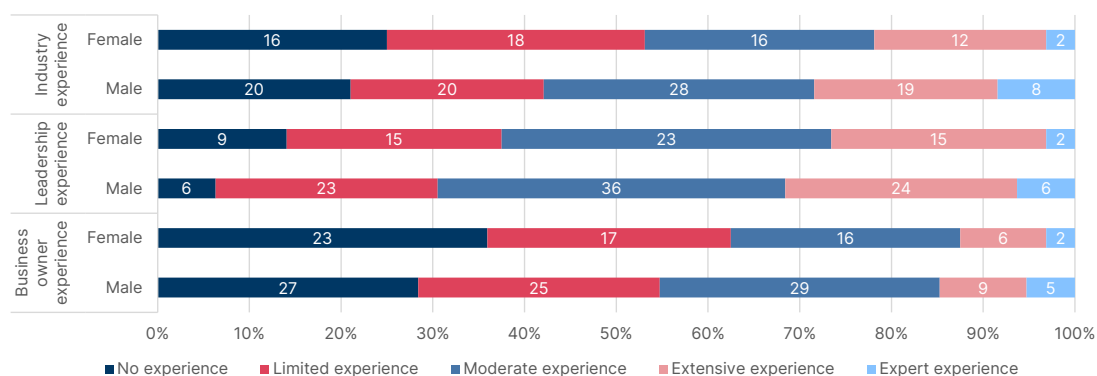


Figure 29. Respondents rating themselves on industry, leadership and business ownership experience by gender (n=159). Source: Dialogic survey

Respondents were additionally asked some questions about the business with which they participated in the Orange Corners track in 2021, including the current status of the business. Only 29 respondents (18%) indicate that their business no longer exists. The majority (81%) reveals that the business still exists and is their own. One respondent has sold their business but is still in production. Business owners whose business still exists were asked in which sector the business is primarily active. In line with the RVO-survey, most business are active in the agricultural sector. Surprisingly, the runner up is education, a sector which was not in the top three sectors based on the RVO-survey.

The respondents were asked if and how much funding they received as part of OCIF track 1 and track 2 between 2021 and 2024. During this period the respondents received a total of € 5.555.394,60 through OCIF track 1 and € 12.235.327,65 through OCIF track 2. Logically we see that most of the funding via track 1 was received earlier than via track 2 (see

Table 46). On average 16% of the funding received via track 2 was a loan, with a maximum of 60% for one respondent. Respondents indicate that they on average have paid back 28,6% of these loans.

Table 46. Funding provided through OCIF track 1 and track 2. Source: Dialogic survey.

	2021	2022	2023	2024
OCIF track 1 (n=53)	€ 602.862,31	€ 3.323.668,03	€ 1.605.322,26	€ 23.542,00
OCIF track 2 (n=26)	€ 117.542,00	€ 3.342.930,75	€ 904.601,50	€ 7.870.253,40
Total	€ 720.404,31	€ 6.666.598,78	€ 2.509.923,76	€ 7.893.795,40

Appendix 6. Case study selection

In section 1.3 we already outlined the research design, including how the 5 case studies were organized and structured. Below we briefly outline how we – in consultation with RVO – selected the hubs for case studies.

We aimed to have a variation in the hubs, to gain insights which are representative for the whole programme, in terms of factors such as Orange Corners + OCIF or only Orange Corners; political context (fragility), geography. The final selection of the country cases (see Table 47) has been made in alignment with the steering committee.

Table 47: Selection of hubs for case studies

	Orange Corners/OCIF	Start date	Fragility*	Location
Upper Egypt	Orange Corners	2021	High	Sub-Saharan Africa
Lagos, Nigeria	Orange Corners + OCIF	2019	Very high	Sub-Saharan Africa
Kurdistan region, Iraq	Orange Corners + OCIF	2020	Very high	Middle East
Casablanca-Rabat, Morocco	Orange Corners + OCIF	2018	Medium	North Africa
Dakar, Senegal	Orange Corners + OCIF	2019	Medium	North Africa

*According to 2024 State Fragility Index. We are aware that differences within countries can be large, but since we have no high-quality data on fragility on a sub-country basis, we use this index.



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