

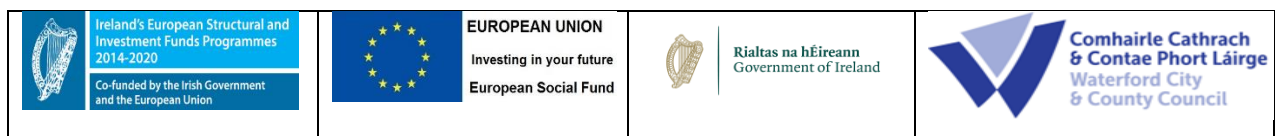


Waterford Area Partnership

Social Inclusion & Community Activation Programme

Evaluation Report on Needs of Community-Based Social Enterprise in Waterford

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List of Acronyms

ARISE	Awareness Raising Initiative for Social Enterprise
BNIM	Biographical Narrative Interview Method
DETE	Department of Enterprise, Trade, and Employment
DRCD	The Department of Rural and Community Development
LEO	Local Enterprise Office
PEIL	Programme for Employability, Inclusion and Learning
SE	Social Enterprise
SICAP	Social Inclusion and Community Activation Programme
TUSE	Technological University of the South East
WAP	Waterford Area Partnership

Introduction

This report was commissioned by Waterford Area Partnership [WAP] to study the needs of community-based Social Enterprise in Waterford within the specific context of the Social Inclusion and Community Activation Programme [SICAP] Goal 1 supports. Goal 1's key objective is: "to support communities and target groups to engage with relevant stakeholders in identifying and addressing social exclusion and equality issues, **developing the capacity of local community groups and creating more sustainable communities**" with the most relevant section in bold.

This focus upon **community-based** Social Enterprise is very important for understanding this report, as there do exist Social Enterprises which have become immensely commercially successful, and expand into regional, national, international, or in some cases even global markets. While this is a significant achievement, such Social Enterprises can also become more distant from the communities where they originally launched. This report speaks to smaller more localised Social Enterprises, who typically have one paid employee and up to a dozen volunteers. These organisations run with smaller budgets, have fewer resources, and therefore tend to rely on the support and good will of their local communities, and this embeddedness is crucial to their appeal, success, and sustainability.

This research was completed by a team led by Dr. Zach Roche based out of the South East Technological University, and under the overall rubric of the Horizon 2020 funded HECAT Project and Waterford Un/Employment Research Collaborative. See hecat.eu or wuerc.com for more information on these projects and research clusters.

This report is structured as follows:

- An [Executive Summary](#) of our findings (next page).
- The [methods](#) we used to conduct this research (page 9).
- A [context](#) section outlining the background necessary to understand the report, with a brief overview and history of Social Enterprise (page 10).
- The [findings](#) of the report, which are broken down into three sections (page 13).
 - [Governmental](#) (page13).
 - [Commercial](#) (page 17).
 - [Networking](#) (page 21).
- The upcoming [opportunities](#) the sector may wish to exploit (page 26).

Executive Summary

The needs of community-based Social Enterprise are broad and complex. The authors divide our findings in this regard into three categories, governmental, commercial, and networking, we address each of these below and expand on them in the findings section later in this report.

Most Social Entrepreneurs agreed that they (and the sector in general) encourages a particular type of socially conscious person to become involved, someone who has a great deal of passion for fixing a particular social problem. While these people are crucial to the success of Social Enterprise and keeping the focus of the sector on the needs of the vulnerable, it was also agreed that such people may lack more conventional entrepreneurial skills such as management, human resources, marketing, business planning, bookkeeping, reporting and so on. This emerges the most strongly in the commercial element of our findings.

We explore the background and history of Social Enterprise in more detail throughout this report, but by way of summary we offer the EU and SICAP definitions below:

“Social enterprises combine societal goals with an entrepreneurial spirit. These organisations focus on achieving wider social, environmental or community objectives. The European Commission aims to create a favourable financial, administrative and legal environment for these enterprises so that they can operate on an equal footing with other types of enterprises in the same sector. The Social Business Initiative, launched in 2011 identified actions to make a real difference and improve the situation on the ground for social enterprises.” (European Union 2022, p.1).

SICAP defines a Social Enterprise as one:

- That trades for a social/societal purpose.
- Where at least part of its income is earned from its trading activity.
- Is separate from government.
- Where the surplus is primarily re-invested in the social objective.

The social contributions of such enterprises is of paramount importance, and helps to ensure inclusion, sustainability, and community growth. As outlined below, there are still great strides to be made in the support frameworks that exist to help these organizations, we begin with their governmental needs before moving to commercial and networking needs.

[Governmental \(page 13\):](#)

Great strides have been made to incorporate Social Enterprise within government policy, however more work could be done in this area. Many participants felt that the current

approach is improvisational or spontaneous, i.e., if a chance to include Social Enterprise comes up then it will be seized in the moment. While this is appreciated, what is desired is inclusion at the earlier stages when planning or strategy is being outlined. Additionally, the current reporting process required by funders is perceived to be onerous due to a reliance on volunteers, and excessively focused on finances over social impact.

- Inclusion in national and local government **strategy**, particularly for the most relevant areas, i.e., social inclusion, disability, migration and so on. The steps taken toward inclusion have been promising but could be more focused.
- **Revision** of the National Strategy for Social Enterprise to focus on Policy Objective Two – Growing and Strengthening Social Enterprise. There is a perception that there is sufficient funding and financing (though it can be difficult to find), but that access to entrepreneurial resources is lacking.
- Support could also be offered through the **Department of Enterprise, Trade, and Employment**, which has a greater focus on these entrepreneurial goals by building skills in leadership, digital skills, marketing, strategic planning, finance and so on.
- **Simplifying** financial reporting, which is seen as onerous and burdensome.
 - It also must be recognised that COVID-19 has had a significant impact, and several participants said that reporting agencies expect them to operate at their pre-COVID levels of profitability.
- Insertion of **social impacts** into the reporting process.

Commercial (page 17):

Many Social Enterprises lean more on the ‘social’ over the ‘enterprise’ element of their calling, and there is a desire for more access to commercial supports to rectify this. However, it should be emphasised that there are supports available, but this depends upon a paid member of staff who has the time to participate in the training / workshop and so on. Such activities facilitate growth and enable the hiring of more staff, reducing the dependency of the sector on volunteer labour, which is an incredible resource but can sometimes be unreliable.

- **Connecting** Social Enterprise with more traditional entrepreneurial supports and resources in areas ranging from leadership to business growth.
- **Facilitating** the hiring of paid staff, many raised the possibility of transitioning a small number of volunteers into paid positions.
- Assistance with **identifying** new funding streams (particularly EU funding streams) or explaining how existing funding streams such as SICAP can be used in more diverse ways. Several participants requested the hiring of a funding officer for the Waterford area who would help Social Enterprises to do this as it was described as “a full-time job”.
- The **provision** of outlines, templates, or other guides which help with the applications process for these funding streams.

Networking (page 21):

The ecosystem and networks that exist in Waterford were described as ‘world class’, and what is desired is more of the same. There was consensus that the pandemic had reduced the quantity and intensity of communication within the Waterford Social Enterprise networks, and that there is now a desire to return to ‘normal’ as soon as possible.

Diversity and inclusion were also raised as specific issues of concern, especially in community-based Social Enterprises where it is crucial that the leaders and champions should come from the vulnerable, marginalized, or disadvantaged communities that they serve. For example, that a voice speaking to issues encountered by migrants is often more powerful when the speaker is also a migrant. It was recommended that there be more focus on mentoring and apprenticeship of the next generation of leaders.

- Communication from WSEN is already at a very high standard, but communication **between** members could stand to improve.
- Particularly through **strong connections** which could be generated by various Social Enterprises coming together to share burdens and costs, for example by creating relief panels to aid those enterprises whose staff are ill or on another form of leave.
- Some in the sector are not convinced of the **relevance** or necessity of entrepreneurial elements such as strategic planning but are prepared to be convinced. Resources such as a ‘spotlight’ on a particularly strong strategic plan would be welcomed.
- **Clarity** around the specific goals and purpose of networks such as WSEN, as the network is somewhat perceived to focus on the needs of new entrants to the sector.
- **Established** Social Enterprises need help with their own issues such as identifying new funding streams, or advice on finding and retaining board members – especially where those board members have enterprise experience.
- **Leadership** building through mentoring and apprenticeship to bring fresh perspectives to the sector.
- More **events and workshops** are welcome but there is also a concern that a lack of time will affect attendance and reduce the impact of such events. There was a general preference to run events digitally in the future, which enables those who could not attend to watch the event afterwards and catch up.

Opportunities (page 26):

In addition to these needs, we also identify six opportunities for Social Enterprise in the near or medium term. These are discussed in more detail later on in the report, but they are summarized here:

1. **Integrated engagement with Ukrainian refugees.** Not only through a concerted effort to help the refugees (such efforts are already underway) but to develop a communications strategy to enable the great work already being done to be shared.
2. **Feedback on the National Social Enterprise Policy.** As the National Social Enterprise Strategy is due to expire at the end of this year, it is likely that a new strategy will be drafted soon. Such drafts usually include a feedback phase, and this is a vital opportunity for Social Enterprise to be heard, and stakeholders should begin to consider the positives and negatives of the existing strategy.
3. **Enhanced Relationships with Local Authorities.** Through more proactive communication and requests to be integrated further into the strategy, plans, and frameworks of local authorities.
4. **Further Engagement with SETU.** Not only with lecturers in their teaching and research duties, but also with students and recent graduates who can make immense contributions to the world of Social Enterprise.
5. **ARISE Funding to Promote Social Enterprise in Waterford.** The recent success of ARISE (Awareness Raising Initiative for Social Enterprise) funding in the West of Ireland, and how a similar funding project could benefit Waterford.
6. **Partnering with Credit Unions.** As community-based organisations that pride themselves on their social consciousness, there is a great opportunity to rectify the financing gaps that exist in SE with support and assistance from Credit Unions.

Methodology

In many respects this research is a successor to a previous study which also took place in Waterford – *Social Enterprise in Waterford: Mapping Survey and Case Studies 2019* which identified that there are 325 Social Enterprises in the Waterford area. 168 of these responded to a survey asking them about the work they do, how long they have been operating, their organisational objectives and so on. This study was a part of a wider pilot research study that was led by the Social Finance Foundation (SFF) with UCC, and also included Breffni Integrated Partnership CLG in Cavan and Ballyhoura Development CLG. The findings from the SFF funded study informed the subsequent development of the first Irish National Social Enterprise Policy in 2019. Currently a wider national data survey of social enterprises is underway with the Department of Rural and Community Development.

While the mapping survey was quantitative in nature, attempting to discover the extent and broad details of Social Enterprise in Waterford, this study is qualitative. Qualitative research focuses on analysing data that is not numerical, such as text or audio to understand concepts, opinions, or experiences. This form of research is ideally positioned to discuss more abstract concepts such as meaning, or belief, and is oriented on achieving a detailed and in-depth understanding of the issue(s) at hand. Quantitative research is often said to be broad, but not deep, while qualitative research is deep, but not broad.

We used a Biographical Narrative Interview Method (BNIM) This is an emergent interview approach in which the interviewee relates their experiences biographically, though in this case the subject of discussion was the Social Enterprise rather than the individual. This enabled us to chart the histories of these different Social Enterprises and allowed us to shine a light on the issues that emerge for this sector at different stages of development. The problems faced by established Social Enterprises are very different to those faced by new entrants for example.

The sample of this research were people working as social entrepreneurs directly, or those working in agencies who regularly encounter and interact with Social Enterprise. Participants were identified by WAP who informed potential participants about the research, their contact details were then circulated to the WUERC team. Participants were invited to a one-hour semi-structured interview where they were asked questions about the needs of their Social Enterprise specifically (if they worked in one) and the sector more generally. An information sheet and consent form was circulated in advance, and all participants were assured anonymity and confidentiality as part of their participation.

All quotes used are anonymised, and any identifying information has been removed from them. We interviewed a total of 9 people from community-based Social Enterprise and 4 people working in local agencies who deal directly with Social Enterprise. Each semi-structured interview lasted approximately 1 hour, and each participant had a lot to say about

the rich complexities of Social Enterprise, and what can be done to help them more effectively.

Context

A Brief History of Social Enterprise

Ireland has a rich history of community led organising and volunteerism as seen in the Gaelic Athletic Association, local councils, the education system and more. The full history of this area is beyond the remit of this report, and we will instead offer a brief outline here to contextualise our findings. The policy framework of the 1990s was guided by a need to respond to the recession and socioeconomic problems of the 1980s. This resulted in a community regeneration strategy which was bottom-up, and which focused on developing an ethos of self-help within communities. In this way local communities were empowered to apply for, and access funding, supports, advice, grants, and frameworks of best practice. Where government or private enterprise had not activated local assets, the community was encouraged to step in and undertake such an activation themselves (e.g., land, heritage sites, untapped skills, talents, or enthusiasm) (Cooke 2018, p.20). Such a strategy enables local people to identify the most pressing issues to their communities and respond to them with agility. Such responses often took the form of social enterprise, which unified the innovativeness and commercial sustainability of an enterprise with the social consciousness of community. Many SE's from this era remain in operation today, though the sector has no shortage of new entrants.

In many respects we are living through a similar era. The Global Financial Crisis of 2007/2008 hit Ireland hard, impacting employment, social inclusion, mental health, and all areas of the economy from the national to the local. Vulnerable rural areas were hit hardest and have also taken the longest to recover. The austerity politics which responded to this crisis have been widely critiqued (Coulter and Nagle 2015) suffice to say that it is now broadly accepted that cutting government spending and increasing taxes at a time of economic contraction was not helpful and may have delayed the recovery. Local areas again took action, developing new (or supporting existing) Social Enterprises which filled the gaps left by the reduction or withdrawal of government services. While the policy framework was not as strong as the action seen in the 1990s, the Commission for the Economic Development of Rural Areas (CEDRA 2014), Action Plan for Rural Ireland (2017) and National Social Enterprise Policy for Ireland (2019-2022) have each made contributions.

CEDRA and the Action Plan for Rural Ireland outlined objectives in terms of employment and investment in rural areas. Local development companies are established in every county and deliver the Social Inclusion & Community Activation Programme, which could in turn produce local solutions to local problems, and the National Social Enterprise Policy outlined a three-step strategy to enhancing the performance of Social Enterprise in Ireland. In July 2017 these various functions were amalgamated through the Department of Rural and Community Development, set up by Michael Ring TD.

More recently, Brexit (2016), the COVID-19 pandemic (2020) and the cost-of-living crisis (2022) have each presented their own problems for social enterprise, the fallout and potential solutions to these issues are still being worked out.

What is Social Enterprise?

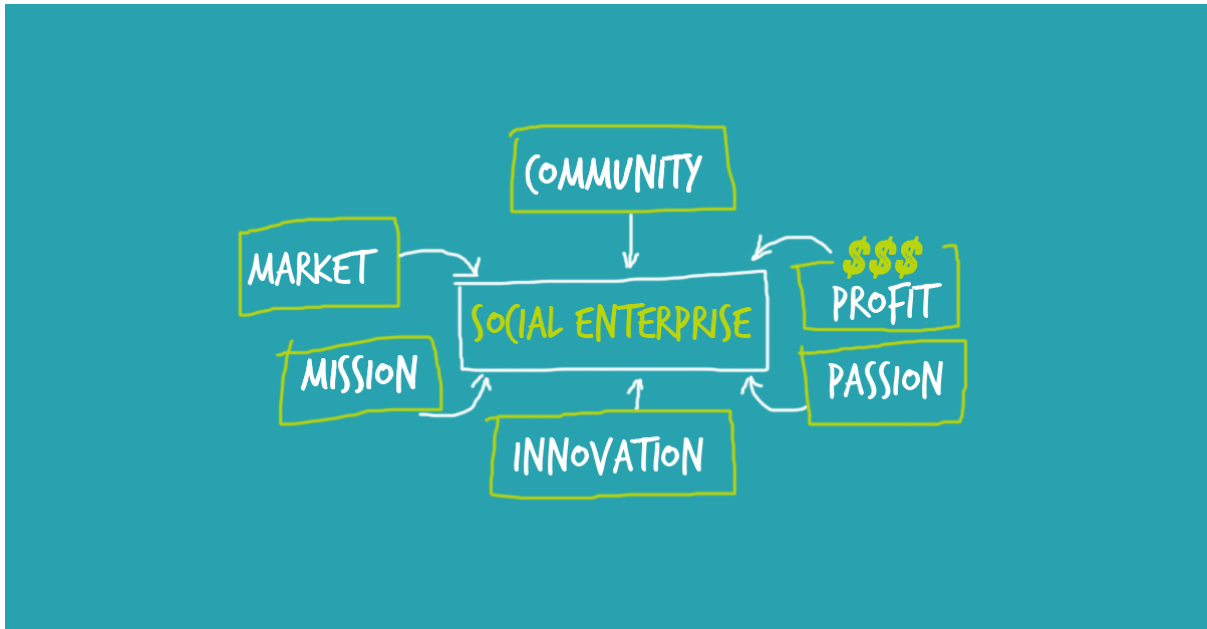


Image credit: [Dundalk Chamber \(Dundalk.ie\)](https://www.dundalk.ie)

There is no universally agreed upon definition of what precisely a Social Enterprise is, but they are broadly thought to be organisations where the power of entrepreneurship is focused upon improving one or more social goals, and such activities are usually expected to be innovative in some way, not simply repeating what has come before. The profit generated through entrepreneurial activities is primarily re-invested in developing further social innovations, and naturally this definition could apply to a wide variety of organisations, not all of which would call themselves Social Enterprises. This ambiguity has encouraged scholars such as Abdulmelike (2017) and Neck et al. (2009) to adopt a “big tent” approach to the concept, which encompasses charities, NGO’s, more traditional enterprises, and venture philanthropy (Young 2002). In Ireland Social Enterprise has tended to operate at the margins of government policy, and it is only since the 2019 – 2022 Strategy that an official definition has been offered:



A Social Enterprise is an enterprise whose objective is to achieve a social, societal or environmental impact, rather than maximising profit for its owners or shareholders.



It pursues its objectives by trading on an ongoing basis through the provision of goods and/or services, and by reinvesting surpluses into achieving social objectives.



It is governed in a fully accountable and transparent manner and is independent of the public sector. If dissolved, it should transfer its assets to another organisation with a similar mission.

This is broadly similar to the definition from the Social Inclusion and Community Activation Programme (SICAP), where a Social Enterprise is an enterprise:

- That trades for a social/societal purpose.
- Where at least part of its income is earned from its trading activity.
- Is separate from government.
- Where the surplus is primarily re-invested in the social objective.

While the SICAP definition has existed for longer, it lacks public visibility, and it is only since the launch of the strategy in 2019 that Social Enterprise has begun to be incorporated into government planning at the strategic level. Based on this research, it is important to clarify and expand on these definitions somewhat, as they do not capture the full picture:

- Social Enterprise is *enterprise*, as one participant said, “**if it does not make a profit, then you’re living in a false economy**”. It is a misnomer that Social Enterprises are exclusively supported by government funding or fundraising and donations. Social enterprises differ from conventional charities because they have a structured process in place to generate income. This often generates confusion because many SE’s also register as charities, and the differences can become blurred.
- Social enterprise is often based in the local community, with connections to Ireland’s rich history of voluntary and community-based organisations.
- Social enterprise is sustainable, precisely because it makes a profit, delivers services and products in a cost-effective manner, and is based in the community (who are generally reluctant to let such enterprises fail).
- Social enterprise is socially innovative, often finding ways to revive idle community assets such as heritage sites, or re-use “waste” created by other organisations.
- Social enterprise is an example of prosocial organising and has made an immeasurable impact on communities and local areas, particularly through the social inclusion of vulnerable people, and the well-known association between mental health and volunteering.

Findings – The Needs of Social Enterprise

We divide the findings of our report into three sections, governmental, commercial, networks. We discuss each in turn, but offer a brief indicative summary here:

- **Governmental** – issues raised not only referred to the broader framework of national government, but also a more intimate focus on local governance. Overall, there is a wish for more inclusion in national, regional, and local socioeconomic strategy, and a desire for recognition of the great work done by Social Enterprise. There is a general feeling that Social Enterprise is distant from government, especially at the national level. The engagement received from local government was praised, but there was a feeling that more could be done to support the sector.
- **Commercial** – most community-based Social Enterprises agree that they are strong on the *social* component of their work, but weaker on the *enterprise* component. They do not always see the purpose or utility of entrepreneurial processes such as strategic planning when they are simply trying to survive day-to-day. However, they are prepared to be convinced of their usefulness but would need funding and assistance to develop and implement such strategies. Likewise, help identifying new or alternative funding streams would be welcome, and there was a desire to have guidelines or templates to follow when filling out such funding applications, as this would reduce the time impact on the Social Enterprise.
- **Networks** – all Social Enterprises we spoke to were members of at least one network. Problems were raised around inactivity of members within networks, the overall purpose, or goals of such networks, and the tendency of networks to revolve around a handful of ‘champions’. While leadership is needed, there is also a need for more sophisticated networks which can lobby for the sector. Existing leaders were praised, but there is a fear that if they retired, moved to another sector, or became ill that they would be virtually impossible to replace.

Governmental Needs

Broadly we were told that the needs of the sector with respect to governance are:

- More **inclusion** of the sector in the formation of government policy.
- **Stronger** policies overall that go beyond awareness raising.
- A **recognition** of what Social Enterprise is, and to clearly distinguish between the sector and the charity sector.
- **Reducing** onerous financial reporting, including offering short-term flexibility which acknowledges the challenges of COVID-19.

- **Enabling** Social Enterprises to include their social impacts in their reporting, even if this is difficult to objectively measure.
- More **proactive** communication and coordination with local stakeholders, especially in the formation of strategy.
- A recognition of the **differences between** various Social Enterprises, and to recognise that smaller community-based Social Enterprises are just as important as those which may be more financially or commercially successful.

National Policy

Social Enterprises feel that they are at the periphery of government policy and are not thought of when policies are made (a common example was Social Partnership). Though Social Entrepreneurs were keen to say that they did sincerely appreciate the work that has been done in the area recently, especially the policy framework (2019 – 2022) and the forming of the new government department of Rural and Community Development. Several participants did raise the formation of the department as a point of interest, as it enables us to infer government thought processes – i.e., that Social Enterprise is seen as fitting within rural and community issues. While it cannot be denied that Social Enterprise makes important contributions to rural communities, they are also strongly present in urban areas, and it could be argued that the sector would have benefitted more from inclusion in the department of Enterprise, Trade, and Employment who have extensive experience and resources in helping SME’s succeed.

<p>I fear I am being too harsh but they [government] seem heavy on symbolism and rhetoric and light on policy action. We need it the other way around, but we appreciate what has been done so far. I am grateful for the policy but we need more, especially on enterprise support”</p>	<p>“I found it curious that the sector was put under the department of rural and community development. Social Enterprise is more than just a rural development strategy, it is even more present in urban areas. I have concerns that some people will be left out”</p>
<p>“The government roadmap on social inclusion is 87 pages long. 87 pages, I say it to you again. Social Enterprise is not mentioned in it once, even though we are at the frontlines helping migrants, carers, single parents. It is exhausting to never be thought of” [bold indicates emphasis by participant]</p>	<p>“I want the policy [the national strategy] to be pushed very hard when it is revised, which should be coming up now in 2023. We have an incredible opportunity here to get into business policy and that should not be wasted”</p>

There was also a feeling that the government did not always appreciate the successes and contributions of Social Enterprise, treating the sector as though it were exclusively supported by government grants or by donations and fundraising. This led to some frustration that the sector is often seen as analogous to charities, but Social Entrepreneurs feel that this is untrue and harmful:

“The government sometimes make me feel like we’re coming to them with the begging bowl out, but it is a symbiotic relationship. They get way above their money’s worth. We are contributing, we are providing a vital service, we are helping with social inclusivity, we are helping to include the disabled, we give people confidence, we help them find jobs. Does this count for nothing?”

Social Entrepreneurs pointed out that the sector:

- Helps with government goals around decentralization, by encouraging local groups and communities to participate meaningfully in their own governance. Indeed, local groups are usually aware of the most pressing issues long before national government agencies even begin to know of them.
- Provides a vital outlet for social inclusion, especially among vulnerable groups such as the elderly, children, the unemployed, travellers, migrants, people with disabilities, people with convictions, members of the LGBTQIA+ community and more.
- Encourages a holistic approach to helping the marginalized or vulnerable, seeing the building of abstract resources such as resilience, trust, or confidence, to be just as essential as ‘concrete’ skills such as interview preparation, C.V. guides, or language skills. Most told us that these things go hand in hand, and as one participant said “inclusion is a process”.
- Revitalizes dormant community assets, such as heritage sites, which can have a significant impact on tourism. Indeed, many of our interviewees pointed out that if it was not for Social Enterprise that many heritage sites would be left “to rot”.
- That many Social Enterprises had remained open during the height of the COVID-19 pandemic and had converted their capacity into making masks and PPE.
- Provides volunteering opportunities for local people, which has a well-established positive impact on mental health.
- Provides goods or services cheaply, usually considerably below the market rate, to ensure the widest possible access.

Local Policy

There was broad agreement that relations between Social Enterprise (and their networks) and local governance organisations such as the Local Enterprise Office, or Waterford City and County Council are good. It was signposted that there is immense capacity in Waterford, and

that this capacity can only be fully realised through coordination, planning, and strategy. While Social Enterprise is more included in governance than ever before, it is felt that strategic planning remains an area that the sector is locked out of. This creates a relationship where inclusion depends on spontaneity and improvisation, rather than one which is organised and planned. Some also expressed a concern that the Council see the relationship as one between funder and funded, rather than as partners working together to make Waterford a better place to live in.

<p>“Our own organisations, the ones we build specifically to network Social Enterprises together have always been excellent. But the others... well those can be hit or miss. The council I feel could be closer to the sector. I think they see their role in processing funding for us, but there is so much more they could be doing”</p>	<p>“We aren’t a part of the planning process, so they come to us and it has a bit of a spontaneous feel to it – ‘we are doing something, you are right for it, do you want to come aboard?’ That is great, but if we were a part of the plan from the start it could all be more organised, and not feel so improvised in the moment”</p>
<p>“One of the focal points of the Council’s Corporate Plan [2019 – 2024] is balanced rural and urban development. Now I would see SE as ideal for achieving that, but we are not mentioned. That is disappointing to me”</p>	<p>“I want them [the Council] to talk to us. They are always courteous and polite; I think they take us seriously. But they never seem to message us first, we always have to ask them what is happening”</p>

- Inclusion of Social Enterprise should be strategic, coordinated, and planned rather than spontaneous and improvised. SE should be a defined part of the Local Enterprise Development Plan (LEDP) with a clear strategy to engage with, and plan collectively with the sector in the next 5-10 years.
- Communication should be proactive, rather than reactive from all parties, including Social Enterprises who should be prepared to take the first step and approach agencies for help.

Financial Reporting

There was almost universal consensus that financial reporting, auditing, impact statements, and other administrative work is a major challenge for the sector, one which is acutely felt by smaller organisations who are more dependent on volunteers. This is an aspect of governance that is seen as a huge barrier to entry for community-based Social Enterprise, especially as such organisations tend to be founded by people who do not have business degrees or prior training in financial reporting as their skills and experience are based on social impact. Some financial reporting also revolves around impact, measuring aspects of the enterprise such as footfall. It was felt that the social impact should be included in some way in the reporting process, even if this would be a challenge to measure.

“Social impact is something that really should be considered. I think the government don’t want it because you can’t really measure it. But when we are talking about work done for a social purpose it should at least be considered. 95% or more of the reporting is financial, I respect that auditing has to happen, but I wish it could be a bit broader”

“The reporting and administrative work is very overwhelming, and that falls disproportionately on smaller organisations who don’t have a person who can do it full-time. The bigger organisations have it easier you see because they can dedicate staff only to administrative compliance, but we are double jobbing”

“Financial reporting for us has always been too much. Now we have only just re-opened, and they are expecting us to perform at our pre-COVID level [of financial performance]. There is no acknowledgement of the impact that COVID has had on us, we need time to build that capacity again”

Commercial Needs

The success and sustainability of Social Enterprise depends on a healthy market where many kinds of business can thrive, in addition to government funding and supports. Our participants had thoughts on both areas. Most of our participants agreed that they were strong on the social issue(s) that their enterprise had been created to address, and indeed were comfortable with describing themselves as experts in these areas. However, they also confessed that they were quite a bit weaker on the commercial side of things and were unsure how to go about improving their knowledge and commercial capacity.

Their most pressing commercial needs are as follows:

- In the short-term there is a focus on **surviving** the lingering impacts of Brexit, COVID, the cost-of-living crisis and the influx of Ukrainian refugees. Any short-term funding available to alleviate this would be welcome.
- In the medium-term there is an **aspiration to expand** and offer services to more people who are experiencing socioeconomic disadvantage. The biggest barrier to this is a shortage of staff, and it was suggested that if DRCD could offer a small number of volunteers a path to becoming paid staff that this would make a bigger difference than funding to expand operations. Many Social Enterprises are operating at (or close to) capacity and would not be able to offer more services even if they were to expand.
- Help **identifying** new funding streams, as the landscape of funding is hugely complex.
- While many community-based Social Enterprises feel that they adequately address the social component, they feel **less informed about the commercial** or enterprise element. Help in this respect would be most welcome, especially to develop Strategic Plans for the future, or to revise their marketing and communications strategy.

- In addition to the above point, a **focused and intensive accelerator programme** similar to that already in use by Social Entrepreneurs Ireland would be welcome as a means to rapidly improve knowledge of the entrepreneurial aspects of SE. There is great scope for SETU, RIKON, ARKLABs, and other business innovation centres to participate in such accelerator programmes locally.
- For the most ‘popular’ forms of funding, there is a need for **templates, guides, outlines** (etc.) to help guide the people who are newer to the area, or to help someone see what an ideal application might look like.

Developing Business Skills

Opinions were mixed on how to address the perceived lack of entrepreneurial skills in the sector. Some thought that a greater focus on entrepreneurship would change the culture, values, or ethos of Social Enterprise in a way that was undesirable.

“I haven’t seen people talking about the cost-of-living issues nearly as much as we should be. Our costs are all going up now, so we have to increase our prices, but many of the people who come in here are unemployed, they are broke. We have to be mindful of how much we charge them. This means we may actually shrink rather than grow, and we always have one eye on the financial situation. I also don’t want to be overly competitive; we are not trying to extract money from poor people and I never want it to become that”

This tension between a desire to serve the community while also remaining financially viable is putting strain on some Social Enterprises, especially on those who provide a service (e.g., computer training workshops) rather than goods. Goods will often be purchased by other Social Enterprises who can accommodate a small average price increase, but a vulnerable community member may be priced out of a service by even a marginal rise in the cost of that service.

Others wondered what the true utility of such skills would be, as one participant said “I know I don’t make much money and I know why. Would there be any actual purpose in putting in all the time and effort to do a full plan showing that? What would be gained?” Most however were prepared to be convinced of the value of a more conventional set of entrepreneurial skills but were not sure how to access them. As mentioned above, there is great scope for such skills to be gained through short but intensive training programmes delivered in cooperation with local stakeholders such as SETU.

Some also felt that there is a kind of invisible barrier to the growth of Social Enterprise where the organisation can grow to a certain size primarily by trading or providing services to or with other organisations in the sector. However, breaking out into the general market in their area is a huge challenge. Overall, participants expressed a need for more entrepreneurial training in the sector.

<p>“My own background is more of a humanities background. I was drawn to SE because of passion, but I underestimated how much business there is to it. It is enterprise at the end of the day, and I am very shaky on enterprise stuff, I am more of an expert on the social issues”</p>	<p>“I didn’t know what a strategic plan was the first time someone mentioned it to me. I would have seen things like leadership as more of a buzzword, but when you work with volunteers leadership and such things really are essential”</p>
<p>“We have a great basis in the community, but a big challenge for me is: how do I go beyond the community and market and sell my products in the wider market? I find it very hard trying to make these connections, I have no experience”</p>	<p>“I still think of the social problems first, and the business second. It is just the way I am; I think most Social Entrepreneurs are the same way. But that can be an obstacle to financial success as well, I think doing well financially is a bit taboo in the sector”</p>

Strategic Planning, or: Going Beyond Sustainability

Leading on from the previous section, there is a tendency for these enterprises to grow to a certain point, achieve sustainability, but then stop growing. Sustainability (including environmental sustainability / consciousness) was agreed to be one of the core virtues of Social Enterprise, which is ensured by volunteerism, low costs, and an attachment to the local community. While it is excellent for vulnerable or marginalized community members to know the service is likely to be there in a year, some participants also suggested that sustainability can be a trap which leads to stagnation. Most participants also suggested that there is a tendency towards overwork in the sector, which can lead to burnout, which then threatens that sustainability. Ultimately the only way for the enterprise to have long-term sustainability is if it is profitable, where this profit is re-invested in the local community.

When describing the commercial sustainability of their enterprise, many of our participants described the situation using phrases like “minimally sustainable”; “just about sustainable”. The prevailing situation was characterised as generally stable but there is no capacity for expansion, with most Social Enterprises concerned with protecting what they have rather than trying to grow.

“We are minimally sustainable. That means we can more or less keep going as we are. But and this is a big but, if two essential people go out on sick leave at the same time, or if they got fed up and moved on to the private sector it would all be over for us. We are very exposed. It took me years to realise it, but I didn’t have a long-term plan, I think I half expected it to fail. Now I’m here years later and I feel like I haven’t made much progress”

Indeed, the lack of a long-term strategic plan can make the activities of Social Enterprise seem improvisational. As one participant put it:

“We need more guidance on how to run and operate as a business really, it can feel like you’re just surviving day-by-day, putting out fires, rather than moving towards something. So it’s sustainable in the short-term, but in the long-term? I can’t say”

One of our more commercially successful participants put their achievements down to a strategic plan which was developed before the enterprise was even started:

“We started with a strategic plan that I wrote myself. I knew what needed to happen, we had to grow, expand, add new services, but it’s more than that. You need to have a vision of what you want, of where you want to be. If you don’t have that vision then you might find you never really go anywhere”

While there is some scepticism of entrepreneurial norms, most Social Enterprises agree that they are willing to at least take a workshop or give the ideas a chance, rather than rejecting them out of hand. There was agreement that developing a strategic plan could be a way out of this.

Funding

The landscape of funding was described as very complex and difficult to navigate without prior experience. There is a feeling that huge potential is “trapped” within the system, and that there are considerable resources available, if only they could be found. Most agreed that the amount of funding is sufficient even if it would be ideal to have more, and most participants find themselves applying for the same funding every year, tending to “copy-and-paste” much of their application from the previous year. Indeed, several participants raised time as the biggest obstacle in the funding process, as the area is so complicated that they could spend an enormous amount of time engaging with it and gain nothing. Overall, it was felt that it was wiser to be “safe” and simply apply for the same funding rather than taking a risk on something new. A suggested solution to this was the provision of templates, guides, outlines, or notes on specific kinds of funding and what the funder is looking for.

“Going for funding consumes everything and that takes away from the business. I don’t apply for everything because it’s a lot of research, to even hear about them. Sometimes you only hear about them when there’s a week left! There’s always something passing you by”

However, it was widely thought that the most significant impact any funding could have upon a Social Enterprise would be that which enables the hiring of additional staff. Especially where that funding would allow volunteers to transition into a paid role. Several Social Entrepreneurs who are paid through Pobal or CORE funding programmes also highlighted that

there must be a review into the payment given to staff. As one participant put it “nobody gets into Social Enterprise to get rich, but I feel that we have been left very far behind, and now cost-of-living is shooting through the roof as well. I just ask them [the government] to take one more look, that’s all”. There was also an issue about having enough time to apply for funding:

<p>“The funding situation is actually quite good in my opinion. The problem is finding what applies to you specifically. We could use more help with that, especially finding new funding”</p>	<p>“Once you know what [funding] you want, there’s an awful lot of copy-and-pasting. Most of the form we would already have filled out, then we’re just changing a few bits based on how the application has changed on that particular year. We win the funding more often than we lose it, but any loss is a big blow”</p>
<p>“I don’t have the time to go through hundreds of pages of funding documents. You asked what I need, what I need is someone to do that for me, I need notes or guidelines on what I should be applying for and how I should be doing it. The concern I have is I could spend a hundred hours looking into the funding and still end up with nothing. I just don’t have the time.</p>	<p>“An outline or template would be incredibly useful [for funding] I have no idea who would do that. Maybe we need an expert who could do that? I don’t know. But I can’t trawl through these documents. I saw the government document [listing all funding available to SE] and had to close it. The complexity is really intimidating.</p>

- The most requested form of funding would be to hire additional staff, preferably by allowing existing volunteers to transition into a paid role.
- Those who are paid through Pobal, CORE or another programme have requested a review of the pay which is currently given, as there is a danger that the pay is so low that even paid employees will be pushed below the poverty line.
- Agencies such as The Wheel (<https://www.wheel.ie/funding>) or the Local Enterprise Office who provide funding support should be highlighted, as assistance does exist in this area.
- The hiring of a professional or expert who would help Social Entrepreneurs apply for funding, as one participant said: “it really is a full-time job”.
- Failing this, templates, guides, or outlines to simplify the process would be much appreciated, possibly facilitated by WAP.

Networking Needs

Most of our participants are members of one or more Social Enterprise networks, especially the Waterford Social Enterprise Network [WSEN]. Overall perception of WSEN is extremely positive, and it is seen as a vital resource that Social Enterprises can draw upon to help guide

them, particularly in moments of uncertainty or difficulty. The warmest regard was reserved for events, workshops, and communication. Most Social Enterprises told a roughly similar story, that they had been engaging with WSEN in various ways until the beginning of the COVID-19 pandemic.

Issues identified include:

- Communication, particularly **between** Social Enterprises.
- Clarity of the **purpose and goals** of existing networks.
- Leadership development, how to **grow** the next generation of leaders in the sector.

Communication

- Communication from networks such as WSEN was praised for its relevance and frequency.
- However, communication between Social Enterprises has suffered since the COVID-19 pandemic, and some have regretted losing touch with their peers and colleagues.
- Many participants advocated for an event of some kind to bring Waterford-based Social Entrepreneurs back together, though they also admitted that planning such an event is difficult due to a lack of time.

Most of our participants said they have a marginal footprint in the communications and social media sphere. Predominately they maintain a website, and a Facebook page, some have Instagram, Twitter, or TikTok accounts but they are not used often, and their social media reach is small. Some lack mission statements, a statement of guiding principles, a motto, or even a logo. Funding to hire a communications expert or web developer to help modernise their website would be warmly received. In some cases the author was not entirely sure what the goal of the Social Enterprise was until the interview actually commenced, as this information was not clearly apparent from the website or other social media resources of the enterprise in question.

There was an admission from most of our participants that since COVID-19 that they had not been as focused on keeping up with news or events about Social Enterprise.

“I’ll admit I used to be very good at it. When someone was running an event I would go along, we would all go along actually, you would all see the same faces – for moral support. When the pandemic hit that all went away, and it’s only now we’re shaking the rust off.”

“It’s a bit of a siege mentality for me. COVID was very stressful with my family, with my own health, just trying to survive. But now I probably could make a bit more of an effort to get back out there and meet with people. There aren’t many of us, we have to stick together and support each other. Why should anyone else support us if we won’t do it ourselves?”

Clarity

Some questions were raised about the exact role of WSEN in the community. When they were asked, the following answers were given for what WSEN is supposed to do:

- Champion the needs of Social Enterprise in the Waterford region.
- Inform local Social Enterprises of opportunities / funding.
- Run workshops or events.
- Provide a hub for Social Enterprises to network with one another.
- Help new Social Enterprises to start out.

Concerning this last point, there was a feeling in general that WSEN is an incredible resource for those who are starting out on their journey in Social Enterprise, or who are considering it as an option. There was universal agreement that WSEN has fantastic resources and patience for guiding beginners through the process and helping them to establish themselves. However, there was a countervailing feeling that more advanced Social Enterprises “get less” out of the network, and that there is room to improve what is offered to these people. This included:

- Guidance on applying for new funding streams, as mentioned in the section on Commercial Needs, this should include tailored advice to specific funding programmes, and could also constitute templates or outlines.
- Aside from funding, the point was raised that the network could play a key role in creating support bridges across the various members. This would allow the Social Enterprise Network to come together to share burdens and costs, thereby building closer ties and creating a collegial atmosphere of mutual support. One participant pointed out that leave (e.g., sick leave) is an issue that the sector grapples with constantly. If there were a system of relief panels where a pool of people were available to be deployed to help those Social Enterprises who had staff on leave, this would be very much appreciated. This was further extended to administrative and funding supports at the level of advice and guidance, enabling less experienced members to avoid mistakes.
- Help attracting or retaining board members. This was raised as a consistent issue by almost every Social Enterprise we spoke to. Finding people who are prepared to do the “boring” work of governance and administration is an ongoing challenge.
- Assistance in developing a business or communications strategy. Some of the smaller Social Enterprises were not certain what the value of these strategies would be and would appreciate some information or workshops on how or why they would be useful (with the caveat that time is limited and such information should come straight to the point).

“Say you’re established, as many of us are – then I suppose the network [WSEN] is... well it’s nice to know it’s there, the collegiality and good nature of the people there is excellent. The help it seems to me is directed mostly at new entrants, and I fully support that. But I would be looking for help with business plans and such things, I’m not sure how much they can aid with that?”

To a certain extent these perceptions are misnomers, as funding for experts such as architects or for strategic planning does in-fact exist through SICAP and other programmes and other supports that can be accessed through the network.

Leadership

- The leadership of the sector, particularly in the Waterford area was the source of universal acclaim, and the achievements of Waterford Area Partnership were particularly highlighted.
- The sector is seen to have fewer resources and less organizing power when compared to the private sector.
- Consequently, there is a reliance on ‘heroes’ who champion the cause of Social Enterprise but also potentially make the sector vulnerable because the number of leaders is limited and there is no plan in place if they retire. As one participant put it “if the three people I’m thinking of all retired at the same time it would be a disaster”.
- Mentoring and apprenticeship of new leaders is seen as crucial for the long-term sustainability of the sector.

There was a general feeling that Social Enterprise suffers from a small number of leaders who tend to be heavily overworked, especially when compared to the network of supports, organisations, and leaders within private enterprise. The sector is generally perceived to rely on the generosity of volunteers, which is positive, but also means that it is challenging to build resilient and enduring organisations. Volunteers will generally also have a full-time job, leaving little time for leadership, community building, activism, or political activities. While it was acknowledged that WAP and WSEN have been great leaders for Waterford, that there is a real need for more structured systems of leadership.

“When you look at what private enterprise has there is no comparison. They have lobbying, and chambers of commerce, huge power to sway and influence government. That comes mostly from creating jobs, but we are socially innovative and helping vulnerable people to get those jobs, they have to be taken care of as well”

In the same vein, there is a similar view that the sector is excessively reliant on leaders / heroes / champions, and that it is unfair for a handful of people to be responsible for trying to keep the sector on the radar of government. Several participants also raised the issue that this produces issues of representation, where the same voices always emerge to defend or advocate for the sector. The contributions of these voices were not minimised, but it was suggested that there should be more of a focus on cultivating the next generation of leaders in Social Entrepreneurship.

“I think to some degree they are victims of their own success. They have driven things and really accomplished a lot, but now people heavily rely on them and I don’t see signs of new blood. We need to get people in the door and really mentor them, show them a peek behind the curtain”

“The sector needs more leaders. The leaders we have are amazing, but we need more, and there needs to be a push for diversity, especially younger people and people who reflect the community members being served by our organisations”

Opportunities for the Sector

This section outlines some of the opportunities that can be capitalized on by Social Enterprise in the near or medium term. The mood among our participants was optimistic, especially when they reflected on all that has been achieved over the past decades.

Look, people give out about all sorts of things: the [government] strategy, the funding, the support, they compare us to what private enterprise have. But I have been here for more than 20 years and I can tell you it has never been better. We have some level of recognition and inclusion, we have funding, we have a national strategy for the first time ever. there is no comparison between now and when I started, **and that is a fact.** 20 years from now it will be even better, I firmly believe that”
[emphasis by participant]

Integrated Engagement with Ukrainian Refugees

There was a general view expressed that times are difficult, every Social Enterprise has been impacted, either directly or indirectly by Brexit, the COVID-19 pandemic, the cost-of-living crisis, and the influx of Ukrainian refugees. However, there was a similar view expressed that these are also opportunities for Social Enterprise to show its value, particularly with respect to the Ukrainian refugees. Because there are so many refugees, all services from public to private are being pushed to their limits. This environment provides a critical opportunity for Social Enterprise to show its value on a subject which already has a huge amount of media visibility and good will by the Irish public.

- A concerted effort by the sector to engage with and help Ukrainian refugees.
- This requires a coordinated and integrated strategy, as such help must include migration services, language courses, psychological / therapeutic / counselling assistance, healthcare, childcare, housing, schooling (for children), jobseeking assistance and more.
- A communications and media strategy that highlights the achievements of Social Enterprise, by outlining the organisations and help being given to the Ukrainians.

One participant had an especially strong view on this:

“Look it’s not something to exploit in a cynical way, but if we don’t advertise all the great work we are doing to help the Ukrainian refugees then how will people ever know of it? We need

to get more visibility in papers, on the radio and so on. We don't do it for the accolades, but it would be no harm to get some positive press out there. It is an easy win, just show off what we are already doing."

Feedback on the National Social Enterprise Policy

The National Social Enterprise Policy is due to expire this year (2022), and it is anticipated that there will be another annual report on the progress made on the strategy in 2021. With a new strategy expected in 2023, there will almost certainly be an opportunity to feedback and comment on the existing strategy which will enable Social Entrepreneurs to put their concerns to the Department directly. Issues which emerged in the interview include:

- Clarity around the definition of Social Enterprise. While a definition is given in the strategy, there is still ambiguity about how a Social Enterprise differs from a charity.
- Creating a registry of Social Enterprise where each company could decide to register or not.
- More focus on building entrepreneurial skills and capacity through cooperation with the Department of Enterprise, Trade, and Employment. Including:
 - Leadership skills through programmes such as Leadership 4 Growth.
 - Digital skills, as emphasised in government reports such as the National Skills Strategy 2025.
 - Marketing and advertising skills to generate a stronger social media footprint, which will further boost awareness of the sector.
 - Management and human resources skills, to help with managing the large numbers of volunteers who work in Social Enterprises.
 - Strategic planning skills to develop achievable long-term goals.
 - Financial skills (for those who need them) in bookkeeping, and financial reporting.
- Clarity around finance and funding. The landscape of funding is vast, but difficult to navigate, resources in this respect would be helpful.
- Awareness raising must extend into government as well as society.

Enhanced Relationships with Local Authorities

Relations between the sector and the various local authorities is good, but it could be better. Some examples that emerged from the interviews:

- Inclusion in the strategy of local authorities. Existing ties were described as weaker and done on an ad-hoc basis, i.e., when an opportunity comes up local authorities will sometimes bring in a Social Enterprise. Incorporating Social Enterprise as part of strategic development would represent a significant step forward. There are signs that this is already happening, e.g., in Waterford Cultural Quarter.

- ‘Meet the Buyer’ actions should more proactively include Social Enterprise. These pre-market events would help immensely with capacity building, aid in sustainability and further improve the knowledge of the social innovations offered by the sector to private and public buyers.

Further Engagement with SETU

The newly founded (as of May 1st, 2022) South East Technological University which merged the Waterford and Carlow Institutes of Technology represents an incredible opportunity for the sector. With a new university comes new strategies, approaches, and leadership, providing a chance to build strong and enduring connections.

University College Cork (UCC) was cited as an example of best practice, with an embedded culture of research, teaching, education, and connections between the university and the sector. While such connections already exist in Waterford, it was suggested by our participants that the new university represents an opportunity to build more bridges in a broad and holistic manner. The single greatest opportunity signposted was in student or graduate work placements. This would bring skilled, vibrant, energetic, and dedicated young people to Social Enterprise who could contribute in a wide variety of areas.

- Engaging with departments, research centres, and research projects (i.e., Horizon Europe projects) amenable to the message of Social Enterprise. ARKLABs and RIKON are existing research centres that could be considered, with a strong record in business planning and innovation.
- Encouraging lecturers to offer more courses or modules on Social Enterprise where this is possible. Where this is not possible lecturers could include Social Enterprise as part of an existing module. The area is broad and flexible, and the sheer variety of Social Enterprise should be made apparent, e.g., teaching in education, un/employment, disability, children’s needs, addiction, migration, social inclusion/exclusion, social movements (including grassroots or community-based movements) and so on.
- Encouraging the formation of student societies in Social Enterprise, where this is not possible it could be viable to try and strike for greater inclusion of Social Enterprise in existing societies dedicated to enterprise.
- Make students and lecturers aware that Social Enterprise would be a great area for student placements, enabling students to contribute meaningfully to the Waterford community. It was emphasised that this should be done from the broadest possible perspective, and that students with ICT training specifically should be included as they may be able to assist with improving the social media footprint or web presence of Social Enterprises.
- Students undertaking their Final Year Projects (FYP) should be made aware that they could pursue Social Enterprise as a research area.

- Encouraging graduates to consider employment or volunteer work in Social Enterprise, or to set up their own enterprise in the sector.

ARISE Funding to Promote Social Enterprise in Waterford

Taking a cue from previous success stories, such as the Map of Social Enterprises in the West of Ireland which was made possible through the Awareness Raising Initiative for Social Enterprise (ARISE) scheme. Assuming there is another call for ARISE funding in the near-term, it would be productive for Social Enterprises to come together and make a joint application. The author notes that the mapping report on Waterford identified 325 Social Enterprises in the Waterford area, while the ARISE funding mapped 288 (in the entire Western region!). Such funding should be used to highlight the work being done in the Waterford area to help vulnerable and socially excluded people through a series of networking and other events. This would raise awareness of the work done in Waterford in a positive way, and enable Social Enterprises in Waterford to come together for a united purpose, something many have expressed a desire to do. For an example see the Western Development website's page about their recent ARISE funding project:

<https://westerndevelopment.ie/2022/05/30/western-development-commission-launches-new-survey-for-social-enterprises/>.

Partnering with Credit Unions

Credit Unions bear many institutional similarities to community-based Social Enterprise, and it was suggested by our participants that a great opportunity exists for cooperation and partnership between the sectors. Credit Unions have been crucial at supporting marginalized or vulnerable communities with financing that they would otherwise not be able to access. There is a clear opportunity for both sectors to partner, enabling Credit Unions to support small and medium local Social Enterprises, and for Social Enterprises to achieve growth or purchase assets that would otherwise not be available. It was made clear that what is needed is not substantial sums of money, but rather occasional short-term financing, as evidenced by the quote below:

“Look I am not talking here about hundreds of thousands of euro, what I am talking about is often just a few hundred euro. Short or medium-term financing to enable us to buy a small asset, or get some renovation work done. Credit Unions could be instrumental in supplying that”

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