An Roinn Forbartha
Tuaithe agus Pobail
Department of Rural and
Community Development

# Social Enterprises in Ireland

## A Baseline Data Collection Exercise

amárach research

SEERI
SOCIAL ENTERPRISE
REPUBLIC OF IRELAND

ildn
IRISH LOCAL DEVELOPMENT NETWORK

Report for the Department of
Rural and Community Development
**www.gov.ie/drcd**

In the framework of the National Social Enterprise Policy for Ireland 2019 – 2022, this project has been commissioned by the Department of Rural and Community Development on behalf of the Government of Ireland to the Consortium formed by Amárach Research, Social Enterprise Republic of Ireland (SERI) and Irish Local Development Network (ILDN).

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We would like to acknowledge the expert contributions of Briga Hynes (University of Limerick), Mary O'Shaughnessy (University College Cork) and Jonathan Coburn (Social Value Lab, Scotland) throughout this work. We would also like to acknowledge the feedback and support from the Department of Rural and Community Development.

We would like to express our gratitude to all those consulted through the process and the social enterprises who participated in this research.

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# Acronyms

ALMP: Activation Labour Market Programmes

CEAI: Community Enterprise Association Ireland

CLG: Company Limited by Guarantee

CRAOL: Community Radio Ireland

CRNI: Community Resources Network

CRS: Corporate Social Responsibility

DRCD: Department of Rural and Community Development

FAQs: Frequently Asked Questions

IACTO: Irish Association for Community Training Organisations

ICSA: Irish Charity Shops Association

ILDN: Irish Local Development Network

ISEN: Irish Social Enterprise Network

LCDC: Local Community Development Committee

LDCs: Local Development Companies

PPNs: Public Participation Networks

SE: Social Enterprise

SERNI: Social Economy Research Network Ireland

SERI: Social Enterprise Republic of Ireland

SEI: Social Entrepreneurs Ireland

SORP: Statement of Recommended Practice

TAG: Technical Advisory Group

# Minister's Foreword

I am delighted to publish this report on the Baseline Data Gathering Exercise on Social Enterprise in Ireland, which for the first time provides us with concrete evidence concerning social enterprise in Ireland, including the numbers of social enterprises and the areas they operate in. The report clearly shows how significant this sector is for Irish society and the economy.

In July 2019, the first National Social Enterprise Policy for Ireland was launched, marking a step change in Ireland's approach to social enterprise. It aimed at developing the sector in terms of scale and impact. Its development provided us with an unprecedented opportunity for policy in Ireland to be implemented in a coordinated and integrated way that supports the social enterprise sector as a whole. A key priority of the policy was the need to gather data on social enterprise to understand its economic and social impact in more detail. Establishing the size, reach and impact of social enterprise in Ireland is essential to inform future policy development.

The findings of the report indicate that social enterprise is a dynamic, diverse and growing sector, active throughout Ireland, creating jobs and providing services to communities including those most marginalised. It clearly shows the important contribution of social enterprise to social inclusion and the green transition.

I would like to thank the consortium who undertook this exercise on behalf of the Department of Rural and Community development, Amárach Research, in partnership with Social Enterprise Republic of Ireland (SERI) and the Irish Local Development Network (ILDN). The research allied good practices from around the world with novel approaches tailored to Ireland's unique experience of Social Enterprise.

I would also like to thank the numerous stakeholders and representative organisations who contributed to the process, many of whom were represented on a Technical Advisory Group who met to review and provide observations on the methodology during its development, and who also ensured the survey was made available to as wide a cohort of social enterprises as possible.

Finally I would like to thank the social enterprises themselves, who took the time to complete the survey. The results of this Baseline Data Gathering Exercise for Social Enterprise in Ireland will be critical in developing policy for the sector for years to come, not least in the development of the next National Social Enterprise Policy that is expected in 2023.

Rest assured that this Baseline Data Gathering Exercise will not be the last such exercise, with further research sure to take place in the future. As our society faces new challenges in the years ahead, I believe social enterprises will continue to identify and deliver new and innovative ways to address those challenges and create a sustainable and inclusive future for everyone. Through initiatives such as this one the Government will continue to support social enterprises to achieve their objectives and to have a positive impact on Irish society, economy and the environment.

**Heather Humphreys TD**

Minister for Rural and Community Development

May 2023

# Executive Summary

## Background

This report represents the first comprehensive baseline data collection exercise of the social enterprise sector in the Republic of Ireland. The work was commissioned by the Department of Rural and Community Development (DRCD) and carried out by a consortium consisting of Amárach Research, Social Enterprise Republic of Ireland (SERI) and the Irish Local Development Network (ILDN), supported by two Social Enterprise researchers. Significant engagement was required with a number of organisations to obtain the information required for the exercise. The project team is indebted to those contributors.

Its principal purpose was to establish a reliable evidence base necessary for successful State policy development and delivery for the social enterprise sector in Ireland. The focus of the exercise was on five key data areas:

(i) identification of the number of social enterprises in Ireland;

(ii) geographical coverage;

(iii) sectors of activity;

(iv) nature and levels of staffing and volunteer engagement; and

(v) the contribution to the economy and sources of income.

It provides a 2022 snapshot of the sector against which future data collection exercises can be compared.

## Scope

The scope of this exercise was governed by the current definition of a social enterprise as outlined in the National Social Enterprise Policy 2019-2022. This definition is aligned with OECD and EU definitions. It defines a social enterprise as:

> *"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" (Government of Ireland, 2019, p. 8).*

Several inclusions/exclusions were agreed. Credit unions are recognised as being an integral part of the broader social economy. However, the credit union sector in Ireland is sizable and is regulated by the Central Bank of Ireland with data readily available. Therefore, they were omitted from this exercise. In the case of Section 38, Section 39 and Section 56 health/social care organisations and sporting organisations, it was agreed that where these organisations were identified by social enterprise support organisations and/or completed the survey and self-declared as social enterprises, they were included.

## Methodology

This project was undertaken between March and December 2022. It comprised two stages:

- Stage 1: Design of the methodology.

This stage involved desk research on social enterprises in Ireland and internationally and through bottom-up stakeholder consultations via four workshops (87 participants) and 13 interviews with sectoral organisations. A feedback loop was established with DRCD through regular updates. In turn, DRCD sought feedback from their Technical Advisory Group.

- Stage 2: Execution of the methodology, data collection, analysis, and reporting.

This stage involved first identifying social enterprises with the assistance of sector intermediaries and other non-sector organisations. Second, to obtain more detailed information, a baseline population of 4,335 social enterprises were asked to complete a survey. A total of 725 surveys were completed, a response rate of 16.7%. The survey data obtained was then analysed and forms the core of this report. Third, the employment (number of employees, volunteers, board members) and economic data (average annual income) of the sample was extrapolated to the entire social enterprise sector to obtain an estimate of the total number of employees, volunteers, and board members, as well as total annual income, of social enterprises in the country. To produce this estimate, organisation-level means for each sector of activity were multiplied by an expansion factor corresponding to the total number of organisations in this sector within the population baseline. This facilitated the estimation - weighted by sector of activity - for employment[1,] volunteers, board members and income for the social enterprise sector in Ireland. The extrapolations are based on the survey response which is considered high. The methodology used is robust, but extrapolation does have some limitations.

## Findings

The social enterprise sector in Ireland comprises *4,335 organisations*. There are approximately *8.5 social enterprises per 10,000 inhabitants*.

*68% of social enterprises are concentrated in four sectors:*

- Childcare;
- Community Infrastructure & Local Development;
- Health, Youth Services & Social Care;
- Heritage Festivals, Arts & Creative Industry.

*57% of social enterprises are in urban areas* (8.3 per 10,000 inhabitants) while *43% are in rural areas* (10.5 per 10,000 inhabitants).

Social enterprise is long established in Ireland and approximately half of the surveyed social enterprises *(49%) have been in operation for more than 20 years.* However, *16% have been established in the last 4 years* pointing to a dynamic and evolving sector (especially relevant in sectors of activity such as Training & Work Integration and Environmental Services). The plurality of their activities is evident with *76.7% engaging in more than one economic activity.*

While a variety of legal forms are adopted by social enterprises, *75% are registered as a CLG with 88% registered with the Charities Regulator.*

1 In assessing employment, a headcount measure of total jobs in the social enterprises was adopted – both full and part time. This headcount approach is consistent with the sectoral analysis of economic performance of Irish businesses. This study has, however, provided an analysis of the average proportions of full and part-time employment for each social enterprise sector based on survey answers.

In relation to the markets served, *75% of social enterprises have a local focus, and in rural areas this increases to 84%. 15% of social enterprises operate internationally.*

Social enterprises are typically *microenterprises (57%) or small enterprises (35%)*, though larger organisations are also represented. The sector employs *84,382 people* (including full-time, part-time employees and contractors). This represents *3.7% of the total Irish workforce.* While employment exists across all sectoral activities, *the areas of Health, Youth Services and Social Care; Childcare; as well as Training and Work Integration create the most employment.*

The *age of the workforce* is predominantly between *31 to 50*. *Women represent 69% of the workforce across the sector and 47% of the workforce is part-time.*

*Labour Market Programmes are an important feature of the sector* with 60% of those with paid staff employing people this way. Indications are that this is more prevalent in rural areas (65%).

The work of *volunteers* is critical in developing activities, taking strategic decisions and developing connections with communities. An estimated *44,501 active volunteers and 30,324 board members* participate in Ireland's social enterprise sector, *totalling 74,825 people*. Nearly *half of these are over 50* and *female* but the *male volunteer participation tends to be greater on Boards.* This ageing profile, especially on Boards (63% over 50) is not unique to the social enterprise sector and presents governance challenges.

*The total income for the sector is €2.34bn (billions), representing 0.63% of Ireland's GDP.*

Mixed sources of *income* (trading, grants etc.) are predominant with *84% noting multiple sources.* Most (64%) derive their income from a mix of trading good/services and government grants. A significant proportion *(40%) have an annual income of less than €100,000* with a *median annual income of all respondents of €180,000.* This reduces to €80,000 in the case of rural social enterprises.

Data from *emergent social enterprises* (established in the last four years) indicates they are especially relevant in sectors of activity such as Training & Work Integration and Environmental Services, are less likely to adopt CLG status or to be registered with the Charities Regulator. They also tend to be less focussed on their immediate locality.

## Learnings

The design and execution of this exercise provides a number of valuable learnings that may enhance future data collection exercises.

1. The construct of the consortium, with sectoral expertise from SERI and ILDN and professional research capability from Amárach Research and Social Enterprise Researchers was essential.
2. The inclusion of, and consultation with, a wide range of social enterprise support organisations enhanced and shaped the methodology.
3. The lack of publicly available financial information on individual social enterprises made it challenging to accurately assess financial data, thus having to rely on extrapolated survey data. The introduction of the Statement of Recommended Practice (SORP) should impact positively on this issue, given the number of social enterprises with charitable status. For applicable charities, SORP sets out standards for financial statements, including more detail on income and expenditure[2]. This, however will only apply to charities with an income greater than €250,000.
4. The collection of survey data was a fundamental part of the exercise. Despite a response rate of 16.7%, survey fatigue is a real issue and alternate methods of capturing relevant data should be explored, subject to GDPR and other considerations.

2 https://www.charitiesregulator.ie/media/4569/guidance-on-charities-sorp.pdf

5. The way in which the baseline population of social enterprises in Ireland was built could lead to the conclusion that the quoted population is understated. As mentioned, several organisation groupings (credit unions, Section 39s etc.) were excluded from the outset. Additionally, full or partial lists of social enterprises were not available from some social enterprise support organisations. Finally, 5% of the baseline figure came from organisations which completed the survey but were not on any list from intermediaries. Any comparisons with other international jurisdictions must take account of these exclusions, the level of publicly available data and the methodologies deployed, especially in relation to estimated sectoral income and employment numbers.

## Conclusions

Social enterprises are an important part of the enterprise/entrepreneurship ecosystem in Ireland, creating jobs and generating meaningful social and environmental impact. The data indicate a highly diversified sector, with a gender, age and labour participation mix. Social enterprises make a significant contribution to local economies.

The diversity of the sector shows the vibrancy and relevance of social enterprises in tackling complex challenges that Irish society and the economy face. It also shows the potential of social enterprises to provide work opportunities for a wide range of workforce participants, across urban and rural areas. However, this diversity also presents challenges, in particular the development of a common identity for the sector.

The delivery of this baseline data for the first time at a national level, represents a critical milestone for the sector. It will facilitate the recognition and promotion of the sector and it also provides a robust foundation for future policy development.

# 1 Introduction

The Department of Rural and Community Development (DRCD) was established in July 2017 to provide a renewed and consolidated focus on rural and community development in Ireland. The Department's Mission is *"to promote rural and community development and to support vibrant, inclusive and sustainable communities throughout Ireland".*

In 2019 the Department published the **National Social Enterprise Policy 2019-2022** which seeks to create an enabling environment for social enterprise in Ireland to grow and contribute to Ireland's social and economic progress. One of the policy commitments to achieve this is to "Improve data collection relating to the extent of Social Enterprise in Ireland and the areas in which social enterprises operate" (Measure No. 23).

The need to gather data on the social enterprise sector and to understand its economic and social impact was highlighted in a number of reports[3], and emerged as a key theme during the development of the National Social Enterprise Policy. DRCD has found during policy implementation, that lack of data, or more specifically no reliable estimate on the number of social enterprises in Ireland, has impeded efforts regarding supports and awareness. **As such, the principal purpose of this exercise is to establish a reliable evidence-base necessary for successful policy delivery through a robust and repeatable data collection exercise regarding the social enterprise sector in Ireland.**

## Social Enterprise Activity

In Ireland, a number of different organisations provide advocacy or support for social enterprises. This breadth of representation is a reflection of the wide range of activities which social enterprises are involved in, such as job creation and the delivery of a broad range of services such as homecare, childcare, employment activation, retail, hospitality and catering, environmental services, and social housing. Social enterprises can take a variety of different forms, including, amongst others:

- Work Integration Social Enterprises (WISEs), which support disadvantaged people to prepare for, and participate in, the labour market,
- Enterprise Development social enterprises which support the creation of other enterprises (e.g. through the provision of office space and facilities),
- Environmental social enterprises which focus on environmental sustainability (including circular economy social enterprises),
- Social enterprises contracted with the public sector to deliver public services in disadvantaged areas and communities,
- 'Deficient Demand' social enterprises which seek to meet a demand for goods and services within a community where there is insufficient demand for the operation of a regular market due to inherent economic and social disadvantage or low density of population.

It is important to note that this is the first baseline data collection exercise regarding the social enterprise sector in Ireland. It provides an evidence basis for the further development of the social enterprise sector by gathering basic factual information from social enterprises. It is not intended to get into the complexity of specific aspects of these organisations but to provide a summarised snapshot of the social enterprise sector in 2022. It also provides valuable learnings and insights that will enhance future data collection exercises.

The rest of the report is structured as follows: Section 2 presents the methodology developed for the design and implementation of a baseline data collection exercise. Section 3 presents the results from the exercise, including the composition of the sector (size, sector of activity, identity and maturity, legal form and status); geographical coverage; reach; employment; volunteers; contribution to economy and finances and mix of (re)sources. Finally, Section 4 presents some conclusions and perspectives for the future of the social enterprise sector.

3 Social Enterprise in Ireland: Sectoral Opportunities and Policy Issues, Forfás, 2013; https://dbei.gov.ie/en/Publications/Publication-files/Forf%C3%A1s/Social-Enterprise-in-Ireland-Sectoral-Opportunities-and-Policy-Issues.pdf; O'Shaughnessy: EU Commission 2020 page 64 https://ec.europa.eu/social/BlobServlet?docId=22456&langId=en

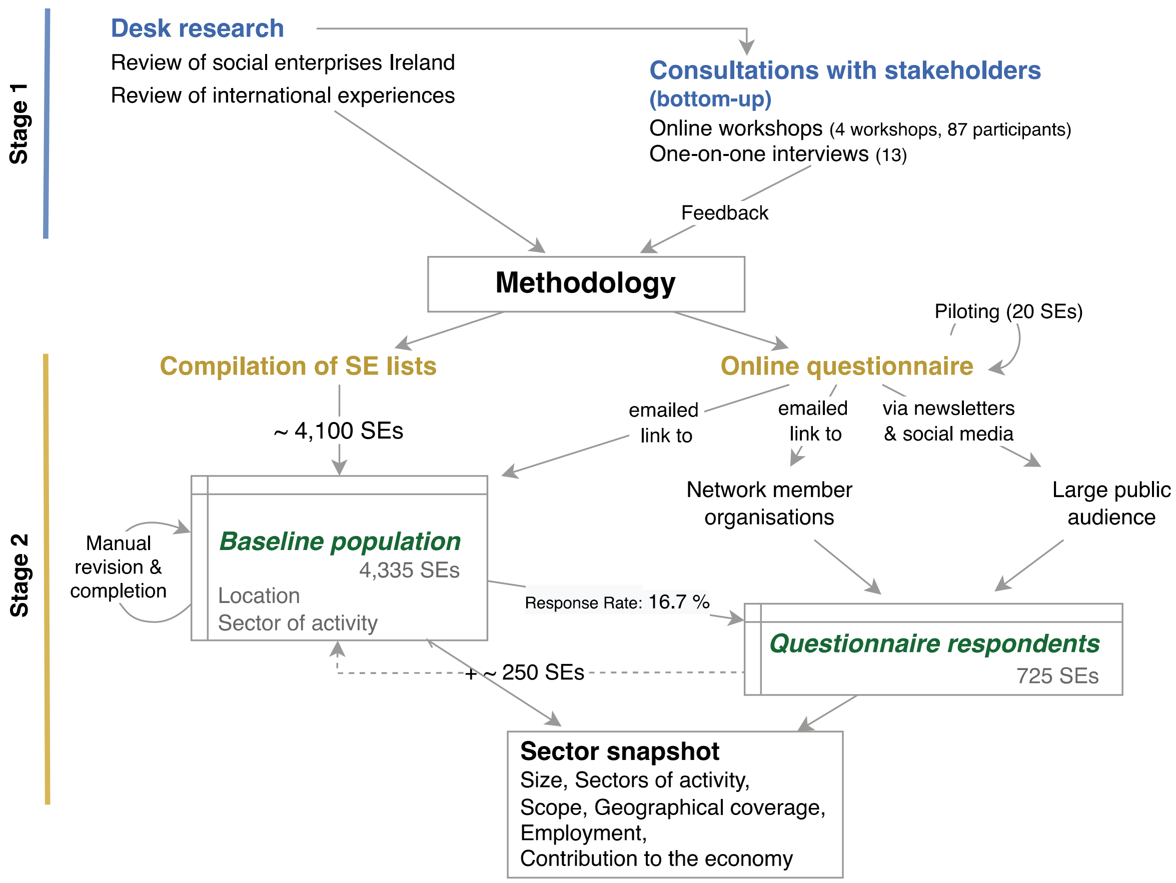
# 2 Methodology

The methodology regarding the first National Social Enterprise baseline data collection for Ireland comprised a number of steps divided in two stages:

> **Stage 1**: Design of the methodology through 1) a review of the literature on current mapping exercises on social enterprises in Ireland and international experiences of baseline data collection; and 2) consultations with social enterprise stakeholders.
>
> **Stage 2**: Execution of the methodology, data collection, analysis and reporting.-

Figure 1. Methodology design and implementation of Social Enterprise Data Collection. illustrates the methodological design and implementation for Ireland's first National Social Enterprise baseline data collection. Its specificity relies on a robust bottom-up approach, which represents a major collective initiative aiming to guarantee legitimacy amongst social enterprise stakeholders and practitioners. The structure and methodology deployed in the project represent a co-created output, which both policymakers and the sector can benefit from. This process also represents a basis for future iterations of this data collection exercise.

*Figure 1. Methodology design and implementation of Social Enterprise Data Collection.*



## 2.1 Stage 1

### 2.1.1 Desk research: social enterprises in Ireland and other international experiences

This task consisted, firstly, of reviewing available mapping exercises, policy papers and research reports on social enterprises in Ireland. This review showed how, despite social enterprises gaining increasing attention from practitioners, academics and policymakers in Ireland and Europe in the last decades, they are not a new phenomenon (European Commission, 2015, 2020). Social enterprises have been part of Irish policy discourse since the 1990s, usually as part of the broader social economy (O'Shaughnessy & O'Hara, 2016). As pointed out by O'Hara & O'Shaughnessy (2021), early policy discourse focused on the potential of social enterprises to provide goods and services to disadvantaged communities and enable local labour market integration (National Economic and Social Forum, 1995).

By early 2000s, social enterprises were considered under the national Social Economy Programme, renamed subsequently as the Community Services Programme. Under this programme social enterprises were characterised by their community ownership, a local-development focus and mostly by providing work-integration opportunities for the long-term unemployed (O'Hara & O'Shaughnessy, 2021). In 2012, social enterprises were also included in the *Action Plan for Jobs*, as part of the response to the national recession and high unemployment. A year later, in 2013, the Forfás report about social enterprises in Ireland defined social enterprises as enterprises driven by social objectives, separated from government, where at least part of the income generated is from trading activity, and the surplus (if any) is reinvested in social objectives. This operational definition remained in place until the publication of the first National Social Enterprise Policy for Ireland in 2019, which represents a milestone for the recognition and institutionalisation of social enterprises in Ireland (Olmedo et al., 2021). This policy establishes an official definition of social enterprises as:

> *"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" (Government of Ireland, 2019, p. 8).*

This definition aligns with definitions of social enterprises proposed by international institutions such as by the EU (European Commission, 2021) and by the OECD (OECD, 2022). The National Social Enterprise Policy recognises, in line with previous research reports, the contribution of Irish social enterprises to deliver a wide range of goods and services and to the achievement of government policy goals in areas such as labour market activation, health care, climate action, social cohesion and rural development (DRCD & Social Finance Foundation, 2018; European Commission, 2015, 2020; Government of Ireland, 2019; Hynes, 2016).

However, the national policy and research reports have pointed to the limited empirical evidence about the Irish social enterprise sector size, scope, geographical coverage, and real economic and social contribution. Significant gaps remained since the available data was drawn from small-scale surveys and many of the previous mapping exercises took place in the absence of a national definition. Therefore, there was a need to gather more comprehensive, systematic, and reliable data on the social enterprise sector.

Second, international experiences of designing and implementing baseline data collection on social enterprises were examined to identify challenges and learnings around these particular processes. These served as an important frame of reference for how data inputs into policymaking. Experiences from Canada (Elson et al., 2016), Australia (Barraket et al., 2016) and Scotland (CEIS et al., 2019; Social Value Lab, 2015, 2017, 2019) were reviewed.

Of special relevance for the project is the case of Scotland, for their similarities to Ireland and being recognised as a leading country in the development of the social enterprise sector and policy. The Scottish Social Enterprise Census is a reference to a collective endeavour of the Scottish Government and social enterprises stakeholders in supporting the social enterprise sector nationwide and growing its impact. The last Census was published in 2019 as the third iteration in a series of biennial studies since 2015. The Census provides a comprehensive picture of the social enterprise sector in Scotland, including size, sectors of activity, regional distribution, reach, and contribution to the national economy and employment. This Census is aligned to the planning, implementation, and review cycle of Scotland's Social Enterprise Strategy 2016-2026. Their fourth Census is currently underway.

The main characteristics of the third version of Scotland's Social Enterprise Census (2019) are as follows (CEIS et al., 2019):

- It provides a comprehensive database of social enterprises, which involves cross-matching, verifying, and filtering data from over 30,000 organisations to identify a population of 5,199 Scottish SEs.
- It delivers a complete and objective financial review of data from publicly available accounts and other sources for 3,794 SEs (73% of all participants).
- It conducts a large-scale survey. An invitation to participate was extended through all relevant social enterprise media and networks and direct emails to over 7,000 potential social enterprises. The response rate was about 18% of the known population (approximately 1,107 surveys completed).

The review of these experiences, particularly the Scottish Census on social enterprise, facilitated the benchmarking of good practices, especially regarding data collection strategies. Some parameters were eventually adapted to the Irish context, e.g., the financial examination was conducted upon a nationwide online survey instead of drawing from standardised public information (not available in Ireland) (see section 2.2.1). Desk research certainly provided a frame of reference that informed the methodological design of the Irish social enterprise baseline data collection.

### 2.1.2 Bottom-up approach: consultations with stakeholders

This task consisted of conducting comprehensive bottom-up consultations with social enterprise stakeholders. The consultations' primary purpose was to engage and leverage stakeholders' knowledge and experience to assist in framing an innovative methodology. These consultation events had the following specific objectives:

- promote awareness of the social enterprise data-gathering exercise,
- highlight the importance of gathering information on the social enterprise sector for policy development,
- leverage participants' knowledge and connections to assist in framing the methodology for the social enterprise baseline data collection exercise —in terms of potential data sources and process for data collection— as well as the dissemination and awareness strategy,
- encourage the consultees to use their communication channels and networks to promote awareness of the data gathering exercise,
- outline data gathering process and elicit feedback,
- identify challenges and,
- create transparency and trust in the process.

Consultation activities took place under two formats:

**a) Workshops**: four online workshops carried out between April and May 2022 with a total number of 87 participants. The first workshop targeted 11 stakeholders who had undertaken previous social enterprises mapping exercises; the second workshop targeted 43 Local Development Companies Social Enterprise/Economy Officers; the third and fourth workshops targeted 33 social enterprise stakeholders, including representatives from intermediary organisations.

Online consultation workshops followed a participatory methodology, facilitated by Consortium members. First a general presentation of the social enterprise baseline data collection project was provided to the participants and the second part was dedicated to discussing three key topics related to the project's development: a) social enterprise data sources and process, b) guidelines for data collection, and c) dissemination and awareness.

Participants shared points of view for every theme based on their own experiences and practical suggestions. Feedback was systematically gathered through note taking from Consortium members and through polls directed to workshop participants.

**b) One-to-one interviews:** 13 interviews (including 15 individuals) were conducted between April and May 2022 with key informants, mainly intermediary networks/institutions, working closely with social enterprises (see Table 1. One-to-one interviews.).

*Table 1. One-to-one interviews.*

| Organisation | | Date |
|---|---|---|
| 1 | Philanthropy Ireland | April 27th |
| 2 | Trinity College Dublin | April 29th |
| 3 | Community Finance Ireland | April 29th |
| 4 | Rethink | May 3rd |
| 5 | POBAL/SE Criminal Justice Sector | May 3rd |
| 6 | Innovate Communities | May 4th |
| 7 | ISEN (2) | May 4th |
| 8 | Western Development Commission | May 5th |
| 9 | Clann Credo | May 9th |
| 10 | Social Entrepreneurs Ireland | May 10th |
| 11 | Social Impact Ireland | May 10th |
| 12 | The Wheel | May 11th |
| 13 | POBAL (2) | May 13th |

The interviews followed a similar structure to the workshops. First a general presentation of the social enterprise baseline data collection project was provided to the interviewee; the second part was dedicated to discussing three key topics related to the project's development: a) social enterprise data sources and process, b) guidelines for data collection, and c) dissemination and awareness. The interviews were recorded with the prior consent of the interviewee and thematically analysed.

All the contributions and feedback gathered from consultation workshops and individual interviews were collated. As depicted in Table 2. Stakeholders feedback., each discussion theme yielded some relevant considerations, which were carefully taken into account for framing the proposal for the methodology implemented in Stage 2.

In addition, throughout Stage 1, there was a constant feedback loop and update process with DRCD[4]. In turn, DRCD sought feedback from their Technical Advisory Group (TAG). All feedback received was incorporated or resolved so that all stakeholders were fully aware of the proposed data collection process (see Appendix 1).

*Table 2. Stakeholders feedback.*

| Discussion Theme | Considerations/Challenges | Actions |
|---|---|---|
| **Guidelines for data collection** | • Stakeholders stressed the need to provide clear guidelines to understand inclusion and exclusion parameters. | ➔ A Guidance document containing Frequently Asked Questions (FAQs) was produced by the Consortium and distributed to stakeholders and social enterprises.<br>➔ Additionally, a dedicated project email (project.team@sedatacollection.ie) was established to standardise and coordinate communication from the project with stakeholders. |
| **Dissemination and awareness** | • Intermediaries pointed out their willingness to play the role of 'bridges' between the Consortium members and social enterprises 'on the ground' during the data collection exercise. | ➔ Nationwide communication strategy led by the Consortium, with the collaboration of DRCD, and stakeholders used their communication channels and networks (including social media and newsletters) for dissemination and awareness purposes. |
| **Social enterprise data sources and process** | • Some intermediaries did not wish to share directly available lists and information on social enterprises within their networks/ membership due to GDPR considerations. | ➔ A dedicated link was distributed by intermediaries within their networks/membership for the provision of information by social enterprises. |
| | • Consultations with stakeholders provided significant information on identifying data sources of social enterprises at national, regional and local level to ensure the diversity of the social enterprise sector was covered.<br>• Despite the wide range of data sources, stakeholders stressed that these did not provide a complete picture of the social enterprise landscape. Due to the dynamic nature of the sector, not all existing social enterprises are covered by current lists; this applies especially to newer, more emergent social enterprises. | ➔ To the greatest extent possible, a comprehensive list of (potential) social enterprises data sources was developed, which encompasses organisations operating across a wide range of sectors (see section 2.2.1). |

4 The above methodology was presented to DRCD on June 3rd, 2022. DRCD approved the Consortium to move to Stage 2 on June 20th, 2022. In addition, the Consortium presented the proposed methodology to the Higher Education Institute Social Enterprise Network on June 24th, 2022, and to the National Social Enterprise Policy Implementation Group on September 8th, 2022.

## 2.2 Stage 2

### 2.2.1 Compilation of available social enterprises lists and population database

Consortium members examined a number of potential social enterprises data sources (Table 3) seeking lists of social enterprises containing basic information i.e., name, address/location, email address and activity[5].

*Table 3. Identified (potential) data sources of social enterprises.*

| Organisation Name |
|---|
| 1. Arts Council |
| 2. Benefacts |
| 3. Carmichael Ireland |
| 4. ChangeX |
| 5. Clann Credo |
| 6. Community Enterprise Association Ireland (CEAI) |
| 7. Community Finance Ireland |
| 8. Community Resources Network (CRNI) |
| 9. Community Radio Ireland (CRAOL) |
| 10. Department of Rural and Community Development (DRCD) |
| 11. Early Childhood Ireland |
| 12. Enactus Ireland |
| 13. Innovate Communities |
| 14. Irish Association for Community Training Organisations (IACTO) |
| 15. Irish Charity Shops Association (ICSA) |
| 16. Irish Council for Social Housing |
| 17. Irish Social Enterprise Network (ISEN) |
| 18. Local Authorities (LCDC) |
| 19. Local Development Companies (LDCs) (49) |
| 20. Local Enterprise Offices |
| 21. Muintir na Tíre |
| 22. National Federation of Voluntary Service Providers |
| 23. Pobal (e.g., CSP) |
| 24. Public Participation Networks - PPNs |
| 25. Rethink Ireland |
| 26. Rural Transport Network – Irish Rural Link |
| 27. Social Economy Research Network Ireland (SERNI) |

5 Communications between DRCD and the Consortium was regular with fortnightly meetings taking place for the majority of the time between end June and early November. Meetings were also arranged as necessary in November and December. In addition, email and telephone updates were given as needed.

| Organisation Name |
|---|
| 28. Social Enterprise Republic of Ireland (SERI) |
| 29. Social Enterprises in the Irish criminal justice system |
| 30. Social Entrepreneurs Ireland (SEI) |
| 31. Social Farming Ireland |
| 32. Social Impact Ireland |
| 33. The Wheel |
| 34. Údarás na Gaeltachta |
| 35. WestBIC |
| 36. Western Development Commission |

After a careful review of the lists received, these were categorised into two groups.

- Lists (A) in which the information could reliably be classified as social enterprises for the baseline data figure by the intermediary organisation. These included lists from intermediaries such as Local Development Companies, Social Economy/Enterprises Officers, Rethink Ireland, Western Development Commission. These lists were automatically included in the baseline figures and deduplicated as appropriate. Some organisational types agreed with the DRCD[6], e.g., credit unions[7], Section 38, Section 39[8] and Section 56 organisations were excluded.
- Lists (B) in which the information was not sufficiently complete to automatically deem the list of organisations provided as social enterprises e.g., PPNs lists. The former lists were not included in the baseline data figure, but the data provided to the Consortium was used for the online questionnaire distribution.

This process, after deduplication, provided a list of approximately 4,100 social enterprises. The key information on these social enterprises was not complete in terms of e-mail (circa 750 missing), address/location (circa 1,400 missing) and activity (circa 2,100 missing). The Consortium did extensive work in filling these gaps and standardising the information gathered.

6 Sporting bodies were not contacted directly to provide lists for the underlying dataset. However, where sporting bodies were included in other intermediary lists, they were left in the dataset. Similarly, where sporting bodies completed the survey and self-declared as social enterprises, they were included. In addition, only Benefacts data from the work undertaken for DRCD in 2020 was included in the dataset. IACTO organisations were excluded.

7 Credit unions are recognised as being an integral part of the broader social economy. However, the credit union sector in Ireland is sizable and is regulated by the Central Bank of Ireland. Data is readily available on the sector with over 200 individual credit unions operating in the Republic of Ireland, holding assets more than €20bn.

8 Where Section 39 organisations completed the survey and self-declared as social enterprises, they were included.

### 2.2.2 Data collection: Questionnaire development and distribution

A questionnaire was developed to obtain information which could only be provided by the social enterprises, i.e., employee data, income data, sources of income, volunteer data. The questionnaire included questions related to:

- Name of organisation (this led to the total numbers of social enterprises present in the Republic of Ireland)
- Spatial location (address, county, Eircode)
- Sector(s) of activity
- Longevity/Year of foundation
- Market reach (local – international)
- Nature and levels of staffing, including:
    - » Social enterprises directly paid staff (gender; age groups; full/part-time)
    - » Social enterprises staff through Activation Labour Market Programmes (ALMPs)
- Volunteers participating and board members (gender; age groups)
- Income, including:
    - » Annual income (total)
    - » Sources of income, e.g., trading, grant, service contract, philanthropy, fundraising.
- Legal form and charitable status
- Classification of certain organisations, e.g., section 39.

The questionnaire included a list of eighteen [18] short and focused questions to address these themes (see Appendix 2). Furthermore, a specific question on the compliance with the social enterprise definition in the National Policy was also included to allow for a filter for those organisations which explicitly declared not meeting these criteria. As previously mentioned, a short guidance document containing frequently asked questions was also built and made available to assist completion (see Table 2).

The questionnaire was designed with a view to making its completion as straightforward as possible (e.g., closed questions). No question other than the name and location of the responding organisation was compulsory. The questionnaire went through a review by a Technical Expert Quality Assurance Panel (constituted specifically by the consortium for this data collection exercise) concerning wording, completion instructions, routing, and layout. The questionnaire and FAQs were also sent to DRCD and the Technical Advisory Group (TAG) for observations. As with the methodology sign off for Stage 1, the feedback received was incorporated or resolved so that all stakeholders were fully aware of the documents. Then, the questionnaire was pilot tested during September 2022 with a sample of twenty [20] social enterprises drawn from different sectors. The purpose of the pilot was to test the usability of the questionnaire and to identify any unforeseen barriers to their engagement.

For full roll-out, the questionnaire was distributed through three main channels:

- Amárach Research distributed a link to all social enterprises included in the lists with available emails.
- Intermediaries were contacted and asked to distribute a link to the questionnaire among their members and networks.
- Links within social media channels, e.g., LinkedIn, were posted asking social enterprises for participation.

A significant engagement and communication campaign was developed by the Consortium, with the collaboration of intermediary organisations and networks and DRCD, including a video from the Minister for Rural and Community Development, Heather Humphreys T.D., encouraging participation.

The survey went live in the field for about four weeks from September 15th, 2022[9]. Fieldwork was declared closed on October 25th, 2022. A total of 824 surveys were successfully completed by the fieldwork closing date.

### 2.2.3 Data processing and analysis

A data quality review was performed on the full sample of 824 completes, as follows:

1. Missing values were checked.
2. Each question was checked individually to ensure a valid answer was provided.
3. Addresses and Eircodes were reviewed versus coded counties to identify potential discrepancies
4. Data gathered for questions related to the organisation's subsidiarity, its employees, annual income, and sources of income were reviewed in detail to identify potential organisations which filled in the questionnaire but do not match to social enterprise policy definition. This was done manually on a case-by-case basis. Supporting evidence from organisation websites was used where necessary.
5. Reported income was reviewed in great detail to identify potential errors/incorrect data. Supporting evidence from organisation websites was used where necessary.

Simultaneously, given that multiple sources/channels were used to reach social enterprises duplicates were inevitable. These were identified using the organisation's name, address and/or Eircode. Each duplicate case was individually examined and removed as a result of the below procedure:

1. Duplicate survey data were compared on all questions; answers with more information were selected.
2. If data were identical, and surveys were completed through the same source, the most recently completed survey was kept.
3. When organisations provided the same Eircode and/or address, but a different organisation name, both surveys were kept.

Through the data quality review, cleaning, and deduplication process, 99 surveys were removed giving the final sample of **725 surveys.** When these valid answers were checked against the list of approximately 4,100 social enterprises provided by intermediaries, approximately 250 new entries were added to the social enterprise population list. This constituted a total figure of **4,335 for the social enterprise baseline population of Ireland**. Against these figures, the **response rate** to the questionnaire was **16.7%**.

Data analysis was conducted as follows:

First, descriptive statistics were computed for each of the questions included in the survey through the MERLIN software, a market research tabulation package for data processing and analysis. For specific analysis requirements, coding was performed, and additional variables created in the data file, e.g., range created to identify four categories of social enterprise maturity (year of establishment), or ranges applied to identify micro, small, medium, large organisations, and those with no employees.

9 Fieldwork started with the soft launch on the 15th of September 2022, followed by a reminder on the 20th. Full launch took place on the 27th of September 2022. Two reminders were sent, on the 4th and 18th of October with an additional email on the 7th of October to inform about the deadline extension.

Second, a cross-tabulation analysis was also conducted on multiple questions to obtain finer-grain information. These analyses provide, for instance, specific information for social enterprises grouped by their geographical location (urban/rural), sector of activity and maturity (year of establishment).

Third, the employment (number of employees, volunteers, board members) and economic data (average annual income) of the sample was extrapolated to the entire social enterprise sector to obtain an estimate of the total number of employees, volunteers, and board members, as well as total annual income, of social enterprises in the country. To produce this estimate, organisation-level means for each sector of activity were multiplied by an expansion factor corresponding to the total number of organisations in this sector within the population baseline. This facilitated the estimation - weighted by sector of activity - for employment[10], volunteers, board members and income for the social enterprise sector in Ireland. The extrapolations are based on the survey response which is considered high. The methodology used is robust, but extrapolation does have some limitations.

10 In assessing employment, a headcount measure of total jobs in the social enterprises was adopted – both full and part time. This headcount approach is consistent with the sectoral analysis of economic performance of Irish businesses. This study has, however, provided an analysis of the average proportions of full and part-time employment for each social enterprise sector based on survey answers.

# 3 Establishing a Baseline of the Social Enterprise Sector in Ireland

## 3.1 Composition of the sector

### 3.1.1 Size

This study has found that the social enterprise sector in Ireland currently comprises 4,335 organisations. This number means that there are approximately 8.5 social enterprises operating in Ireland per 10,000 inhabitants. Compared to other countries where similar exercises have been carried out, Ireland presents lower levels of social enterprises per inhabitant than Scotland but higher than Hong Kong, New Zealand, Australia, or Canada[11] (see Table 4. Number of social enterprises per 10,000 inhabitants.).

*Table 4. Number of social enterprises per 10,000 inhabitants.*

| Country | Number Social Enterprises | Population (millions) | Social enterprises per 10,000 inhabitants |
|---|---|---|---|
| Australia | 12,033 (Gales and Kahil, 2022) | 25.8 | 4.7 |
| Canada | 7,000 (Elson et al., 2016) | 38.2 (Statistics Canada, 2021) | 1.8 |
| Hong Kong | 4,000 (British Council and Social Enterprise UK, 2022) | 7 (British Council and Social Enterprise UK, 2022) | 5.7 |
| Ireland | 4,335 | 5.123 (CSO, 2022) | 8.5 |
| New Zealand | 2,589 (Hurren et al., 2018) | 4.9 (Stats NZ, 2019) | 1.8 |
| Scotland | 6,047 (Social Value Lab, 2022) | 5.466 (Office for National Statistics, 2022) | 11.0 |

11 Definition of social enterprises varies according to countries.

### 3.1.2 Sector of activity

Social enterprises in Ireland operate in a wide range of sectors of the economy[12]. The sectors with greater numbers of social enterprises in Ireland include:

- Early Learning and Care & School Aged-Childcare (hereafter Childcare);
- Community Infrastructure and Local Development;
- Health, Youth Services, and Social Care; and
- Heritage, Festivals, Arts and Creative Industry.

These sectors together account for two-thirds of the social enterprise sector (67.4%) (Table 5. Sector of activity in which social enterprises operate.).

*Table 5. Sector of activity in which social enterprises operate.*

| Sector of activity | Number of organisations (n=4,335) | % in the sector |
|---|---|---|
| Childcare | 1,156 | 26.7% |
| Community Infrastructure & Local Development | 711 | 16.4% |
| Health, Youth Services & Social Care | 592 | 13.7% |
| Heritage, Festivals, Arts & Creative Industry | 463 | 10.7% |
| Sport & Leisure | 330 | 7.6% |
| Training & Work Integration | 265 | 6.1% |
| Consultancy & Support Services | 253 | 5.8% |
| Housing | 196 | 4.5% |
| Food, Catering & Hospitality | 115 | 2.7% |
| Environmental Services | 111 | 2.6% |
| Retailing | 54 | 1.2% |
| Other (e.g., animal rescue & care, and timebanks) | 32 | 0.9% |
| Transport | 21 | 0.5% |
| Financial Services | 17 | 0.4% |
| Manufacturing | 13 | 0.3% |

12 Early Learning and Care & School Aged-Childcare (e.g., childcare centres, community playgroups, community creches and nurseries, family resources centres); Community Infrastructure and Local Development (e.g., community centres, community halls, community development associations); Health, Youth Services and Social Care (e.g., youth cafés, care organisations, disability support and services; eldercare centres) Heritage, Festivals, Arts and Creative Industry (e.g., heritage centres, theatre companies and arts centres, community radios); Sport & Leisure (e.g., leisure centres, and community sports complex); Training & Work Integration (e.g., work integration social enterprise, community training centres); Consultancy & Support Services (e.g., learning hubs, enterprise centres); Housing (e.g., housing associations); Food, Catering & Hospitality (e.g. community cafes); Environmental Services (e.g., circular economy and renewable energy production); Retailing (e.g., charity shops and community shops); Transport (e.g., accessible transport for people with disabilities); Financial Services (e.g., community finance and social finance programmes); Manufacturing (e.g., furniture, clothing, crafting initiatives); and Other (e.g., animal rescue, adoption & care, and timebanks).

In addition, because of the plurality of their mission, social enterprises are likely to work across multiple economic sectors, 76.7% of the surveyed organisations in Ireland engage in more than one economic activity (Table 6). The average number of activities for social enterprises participating concurrently is 3. Organisations citing Community Infrastructure and Local Development as their principal economic activity, declared the greatest number of complementary economic activities.

*Table 6. Social Enterprises Multi-activity.*

| Sector of activity | % of Multi-activity organisations (n=725) | Average of sectors in which SE operate |
|---|---|---|
| Food, Catering & Hospitality | 91.3% | 5 |
| Retailing | 90.0% | 3 |
| Health, Youth Services & Social Care | 88.4% | 4 |
| Community Infrastructure & Local Development | 87.4% | 4 |
| Training & Work Integration | 87.1% | 4 |
| Environmental Services | 86.7% | 4 |
| Housing | 79.5% | 3 |
| Heritage, Festivals, Arts & Creative Industry | 73.9% | 3 |
| Sport & Leisure | 71.7% | 2 |
| Consultancy & Support Services | 70.4% | 3 |
| Other | 68.8% | 3 |
| Transport | 66.7% | 3 |
| Manufacturing | 50.0% | 2 |
| Childcare | 41.3% | 2 |
| Financial Services | 25.0% | 2 |
| **Total** | **76.7%** | **3** |

### 3.1.3 Identity and Maturity

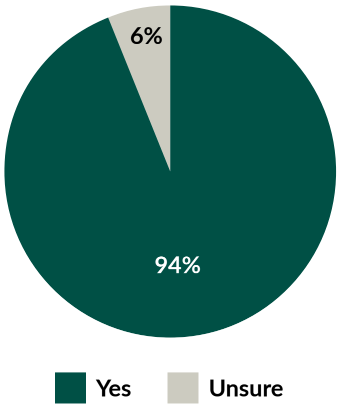
An official definition of social enterprise was established with the first ever Ireland's National Social Enterprise Policy published in 2019 (Government of Ireland, 2019):

> *"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" (Government of Ireland, 2019, p. 8).*

Figures from the national survey show that the majority of respondents (94%) self-identified with the elements present in the policy definition whereas only 6% were unsure about it (see Figure 2).

*Figure 2. Social enterprises that identify with official definition.*

*(n=725)*




The social enterprise sector in Ireland is diverse in terms of the maturity (year of establishment) of the organisations (see Table 7. Maturity (years of establishment) of social enterprises.). On the one hand, approximately half of the surveyed social enterprises (48%) have been in operation for more than 20 years. This figure clearly shows that social enterprises are not a new phenomenon in Ireland, and they have a long tradition. However, 16% of surveyed social enterprises have been established in the last 4 years. This figure points out that despite not being a new phenomenon, the social enterprise sector is dynamic, with the ongoing creation of new social enterprises.

*Table 7. Maturity (years of establishment) of social enterprises.*

| Years of establishment | % of total SEs (n=725) |
|---|---|
| 0-4 years | 16% |
| 5-10 years | 14% |
| 11-20 years | 22% |
| +20 | 48% |

Sectors where social enterprises have operated traditionally include Heritage Festivals Arts & Creative Industry, Childcare, Community Infrastructure & Local Development, Sport and Leisure and Housing (see Table 8. 'Traditional' social enterprises sectors in Ireland.). On the other hand, emergent social enterprises (those created in the last 4 years) are especially relevant in sectors of activity such as Training & Work Integration and Environmental Services (e.g., circular economy and renewable energy production) (see Table 9).

*Table 8. 'Traditional' social enterprises sectors in Ireland.*

| Sector of Activity[13] | % of social enterprises +20 years of establishment (n=725) |
|---|---|
| Heritage, Festivals, Arts & Creative Industry | 62% |
| Sports & Leisure | 59% |
| Community Infrastructure & Local Development | 57% |
| Childcare | 54% |
| Housing | 54% |

*Table 9. 'Emergent' social enterprises sectors in Ireland.*

| Sector of Activity[14] | % of social enterprises 0-4 years of establishment (n=725) |
|---|---|
| Environment Services | 33% |
| Training & Work Integration | 30% |

### 3.1.4 Legal form and status

Social enterprises do not have a dedicated legal form and/or legal status in Ireland, instead they adopt a variety of legal forms provided for by the Companies Acts as well as legislation governing the functioning of cooperatives. Over three out of four social enterprises within the survey adopt the Company Limited by Guarantee (CLG) as their legal form (see Table 10. Legal forms adopted by social enterprises in Ireland.) This figure concurs with previous studies on the sector (Lalor and Doyle, 2021; European Commission/O'Shaughnessy, 2020; Hynes, 2016).

*Table 10. Legal forms adopted by social enterprises in Ireland.*

| Legal form | % (n=725) |
|---|---|
| Company Limited by Guarantee (without share capital) | 77% |
| Co-operative (Industrial and Provident Society) | 4% |
| Company Limited by Share Capital | 2% |
| Designated Activity Company Limited by Shares | 1% |
| Designated Activity Company Limited by Guarantee | 2% |
| No Legal Form (Unincorporated Association) | 4% |
| Sole Trader | 2% |
| Hybrid | 3% |
| Do not Know | 5% |

13 Sectors which represent less than 5% of respondents to the survey have not been considered.

14 Sectors which represent less than 5% of respondents to our survey have not been considered.

## 3.2 Geographical coverage

The CLG represents the usual adopted legal form for all groups of social enterprises according to their year of establishment. However, within emergent social enterprises (0-4 years of establishment), 60% of social enterprises are registered as CLG compared to 82% for 'traditional' social enterprises (+20 years of establishment). Within the group of emergent social enterprises, however, other legal forms such as 'company limited by share capital' (8%) are adopted in greater numbers when compared to more established/traditional social enterprises.

The great majority of social enterprises in Ireland hold charitable status as shown by 88% of our survey respondents declaring to be registered with the Charities Regulator. Within the emergent social enterprises group, this figure decreases to 83%. Considering that 13,878 charities are currently operating across Ireland (Charities Regulator, 2022), we estimate that 25% of organisations that hold charitable status are social enterprises.

### 3.2.1 Urban/Rural distribution

Social enterprises are distributed across urban and rural areas of Ireland. Of the total population of 4,335 social enterprises 57% are located in urban areas whereas 43% are distributed across rural Ireland (see Table 11. Urban and rural social enterprises. Total and ratio.).

Social enterprises located in urban areas outnumber those in rural areas. However, considering the population living in urban and rural areas (CSO, 2017[15]), the ratio of social enterprises in rural areas is higher (10.5 social enterprises per 10,000 inhabitants) than in urban areas (8.3 social enterprises per 10,000 inhabitants).

*Table 11. Urban and rural social enterprises. Total and ratio.*

| Location | Total social enterprises (n=4,335) | % Ireland's social enterprises | Total population (CSO, 2017) | % Population (CSO, 2017) | Ratio (SEs/10,000 inhabitants) |
|---|---|---|---|---|---|
| Urban | 2,470 | 57.0% | 2,985,781 | 62.7% | 8.3 |
| Rural | 1,865 | 43.0% | 1,776,084 | 32.7% | 10.5 |

Childcare represents the main sector of activity for urban and rural social enterprises (see Table 12. Social enterprises sector of activity. Urban, Rural.). However, social enterprises developing activities related to community infrastructure and local development represent 22.8% of rural social enterprises compared to 11.8% in their urban counterparts. On the other hand, social enterprises related to health, youth services and social care represent 16.8% of urban social enterprises while only 9.2% of those located in rural areas.

Despite social enterprises operating in a wide range of activities in both urban and rural areas, the concentration of social enterprises in specific sectors is greater in rural areas. The three main activities developed by rural social enterprises comprise 64.2% of the organisations, this percentage decreases to 54.3% for the case of urban social enterprises. These figures suggest a greater sectoral diversification in the case of urban social enterprises.

15 Urban and rural figures for Census 2022 have not been released yet (27/11/2022).

*Table 12. Social enterprises sector of activity. Urban, Rural.*

| Sector of activity | Total (n=4,335) | Urban (n=2,470) | Rural (n=1,865) |
|---|---|---|---|
| Community Infrastructure & Local Development | 16.4% | 11.8% | 22.8% |
| Childcare | 26.7% | 25.7% | 28.7% |
| Training & Work Integration | 6.1% | 7.4% | 3.9% |
| Environmental Services | 2.6% | 2.5% | 2.4% |
| Financial Services | 0.4% | 0.5% | 0.3% |
| Food, Catering & Hospitality | 2.7% | 2.1% | 3.2% |
| Health, Youth Services & Social Care | 13.7% | 16.8% | 9.2% |
| Housing | 4.5% | 6.0% | 2.8% |
| Consultancy & Support Services | 5.8% | 7.8% | 3.0% |
| Manufacturing | 0.3% | 0.3% | 0.3% |
| Retailing | 1.3% | 1.4% | 1.0% |
| Sport & Leisure | 7.6% | 6.9% | 8.6% |
| Heritage, Festivals, Arts & Creative Industry | 10.7% | 9.2% | 12.7% |
| Transport | 0.5% | 0.6% | 0.3% |
| Other (e.g., animal rescue & care, and timebanks) | 0.7% | 0.8% | 0.7% |
| Not found | 0.1% | 0.1% | 0.2% |
| **Total** | **100%** | **100%** | **100%** |

### 3.2.2 County distribution

Social enterprises are distributed across all counties of the Republic of Ireland (see Table 13. Distribution of social enterprises per county.). The county with the greatest number of social enterprises is Dublin, followed by Cork and Donegal. These counties share 35.4% of social enterprises in Ireland.

When considering the population of each county, those with the highest ratio of social enterprises per inhabitants are found in Leitrim (26.2 social enterprises per 10,000 inhabitants); Donegal (18.5 social enterprises per 10,000 inhabitants) and Monaghan (17.3 social enterprises per 10,000 inhabitants). Interestingly, Dublin and its neighbouring counties, i.e., Meath, Kildare and Wicklow, present the lowest ratios of social enterprises per inhabitant.

*Table 13. Distribution of social enterprises per county.*

| County | Total population | % Population | Number of social enterprises | % Social enterprises (n=4,335) | Ratio (SE/10,000) |
|---|---|---|---|---|---|
| Carlow | 61,931 | 1.2% | 67 | 1.5% | 10.8 |
| Cavan | 81,201 | 1.6% | 83 | 1.9% | 10.2 |
| Clare | 127,419 | 2.5% | 135 | 3.1% | 10.6 |
| Cork | 581,231 | 11.3% | 454 | 10.5% | 7.8 |
| Donegal | 166,321 | 3.2% | 307 | 7.1% | 18.5 |
| Dublin | 1,450,701 | 28.3% | 775 | 17.9% | 5.3 |
| Galway | 276,451 | 5.4% | 255 | 5.9% | 9.2 |
| Kerry | 155,258 | 3.0% | 193 | 4.5% | 12.4 |
| Kildare | 246,977 | 4.8% | 67 | 1.5% | 2.7 |
| Kilkenny | 103,685 | 2.0% | 88 | 2.0% | 8.5 |
| Laois | 91,657 | 1.8% | 62 | 1.4% | 6.8 |
| Leitrim | 35,087 | 0.7% | 92 | 2.1% | 26.2 |
| Limerick | 205,444 | 4.0% | 241 | 5.6% | 11.7 |
| Longford | 46,634 | 0.9% | 50 | 1.2% | 10.7 |
| Louth | 139,100 | 2.7% | 79 | 1.8% | 5.7 |
| Mayo | 137,231 | 2.7% | 227 | 5.2% | 16.5 |
| Meath | 220,296 | 4.3% | 130 | 3.0% | 5.9 |
| Monaghan | 64,832 | 1.3% | 112 | 2.6% | 17.3 |
| Offaly | 82,668 | 1.6% | 81 | 1.9% | 9.8 |
| Roscommon | 69,995 | 1.4% | 103 | 2.4% | 14.7 |
| Sligo | 69,819 | 1.4% | 99 | 2.3% | 14.2 |
| Tipperary | 167,661 | 3.3% | 160 | 3.7% | 9.5 |
| Waterford | 127,085 | 2.5% | 141 | 3.3% | 11.1 |
| Westmeath | 95,840 | 1.9% | 79 | 1.8% | 8.2 |
| Wexford | 163,527 | 3.2% | 110 | 2.5% | 6.7 |
| Wicklow | 155,485 | 3.0% | 85 | 2.0% | 5.5 |
| Not found | | | 60 | 1.4% | |

## 3.3 Reach

Social enterprises sell their products and services to consumers/users within their localities but some of them also target national and international users, consumers, and markets (see Table 14. Reach of social enterprises activities.). These different levels are not mutually exclusive, social enterprises can focus their services to their immediate locality but at the same time develop these and/or other products/services which reach a national audience.

Three out of four social enterprises present a local focus, within rural areas this increases to 84% of social enterprises. Besides their attention to solve local challenges, 30% of social enterprises expand their operations and/or targets to a national level and 15% operate internationally[16].

*Table 14. Reach of social enterprises activities.*

| Reach of activities | Total (n=725) | Urban (n=442) | Rural (n=283) |
|---|---|---|---|
| Local | 75% | 68% | 84% |
| County | 44% | 45% | 43% |
| National | 30% | 32% | 27% |
| International | 15% | 16% | 15% |

The reach of social enterprises is different according to their sector of activity (see Table 15). For example, those social enterprises operating within Childcare and Community Infrastructure & Local Development denote an almost exclusive local focus which relates to the nature of their activities. Social enterprises operating in other sectors such as Training & Work Integration; Environmental Services; Consultancy and Support Services present a focus that usually includes but goes beyond their localities, developing activities that target county, and often also national consumers/users. Social enterprises operating within the Heritage Festivals, Arts & Creative Industry show an interesting multi-scalar focus, with 82% of social enterprises developing activities focused on their immediate localities but at the same time half of these social enterprises declare to have also a national (56%) and international (46%) focus.

*Table 15. Reach activities social enterprises in different sectors of activity. (n=725)*

| Sector of activity | Local | County | National | International |
|---|---|---|---|---|
| Childcare | 93% | 21% | 3% | 1% |
| Community Infrastructure & Local Development | 96% | 32% | 8% | 3% |
| Training & Work Integration | 60% | 53% | 49% | 27% |
| Environmental Services | 71% | 49% | 38% | 18% |
| Consultancy & Support Services | 65% | 46% | 43% | 13% |
| Heritage, Festivals, Arts & Creative Industry | 82% | 70% | 56% | 46% |

16 This international focus does not only refer to social enterprises exporting goods/services, but it also includes those social targeting international customers, for example international visitors to a festival.

Differences in the reach of the activities of social enterprises can also be observed according to their maturity (year of establishment) (see Table 16. Reach activities social enterprises by maturity (years of establishment).). Emergent social enterprises tend to be less focused on their immediate locality compared to more established/ traditional social enterprises. Rather, these newer social enterprises present a greater focus on reaching national and international levels than more established/traditional.

*Table 16. Reach activities social enterprises by maturity (years of establishment).*

| Focus/Reach | Maturity (years of establishment) | | | |
|---|---|---|---|---|
| | **0-4 years** (n=113) | **5-10 years** (n=100) | **11-20 years** (n=156) | **+20 years** (n=356) |
| Local | 56% | 72% | 74% | 81% |
| County | 38% | 48% | 46% | 44% |
| National | 47% | 45% | 27% | 22% |
| International | 22% | 18% | 17% | 12% |

## 3.4 Employment

A significant contribution from social enterprises relates to job creation, especially for vulnerable populations. Social enterprises contribute to the employment of 84,382 people (including full-time, part-time employees and contractors). This represents 3.7% of the total Irish workforce[17].

Of the social enterprises surveyed, 77% organisations declared having employees among their workforce. This figure increases to 83% for social enterprises in urban areas compared to 67% for those located in rural areas.

Considering a standardised classification of enterprises in terms of size, over half (57%) of the surveyed organisations can be classified as microenterprises, employing between 1 to 9 people. These are followed by small enterprises, employing between 10 to 49, which formed 35% of social enterprises. Social enterprises of medium size, employing between 50 to 249 employees, represent 6% of total social enterprises and 1% are large social enterprises, employing more than 250 employees (see Table 17. Social Enterprises classification according to (employment) size.).

*Table 17. Social Enterprises classification according to (employment) size.*

| Size | % of total SEs (n=558) |
|---|---|
| Microenterprise | 57.3% |
| Small enterprise | 35.4% |
| Medium enterprise | 6.2% |
| Large enterprise | 1.1% |

17 For this calculation, the Economically Active Population figure (2,115,600 people) from the Labour Force Survey Quarter 3 (2021), Central Statistics Office, Ireland, retrieved in https://www.cso.ie/en/releasesandpublications/ep/p-lfs/labourforcesurveyquarter32021/employment/ was used.

The average number of employees, full and part time (excluding contractors) in the surveyed organisations is 15 people. Concerning the type of work, 45.5% of the Irish social enterprise sector workforce are full-time employees, 46.9% part-time and 7.6% contractors.

### 3.4.1 Employment generation in key sectors

Social enterprises' workforce varies according to different sectors (see Table 18. Social Enterprises workforce according to sector of activity. (n=558 organisations).). The main three sectors of activity in terms of employment are Health, Youth Services and Social Care; Childcare; and Training and Work Integration. They encompass almost three-quarters (74.1%) of social enterprises employees in Ireland, while representing together 51.2% of the total social enterprise sector in terms of number of organisations (see Table 5 in section 3.1.2). Hence, these represent work intensive sectors for social enterprises.

*Table 18. Social Enterprises workforce according to sector of activity. (n=558 organisations).*

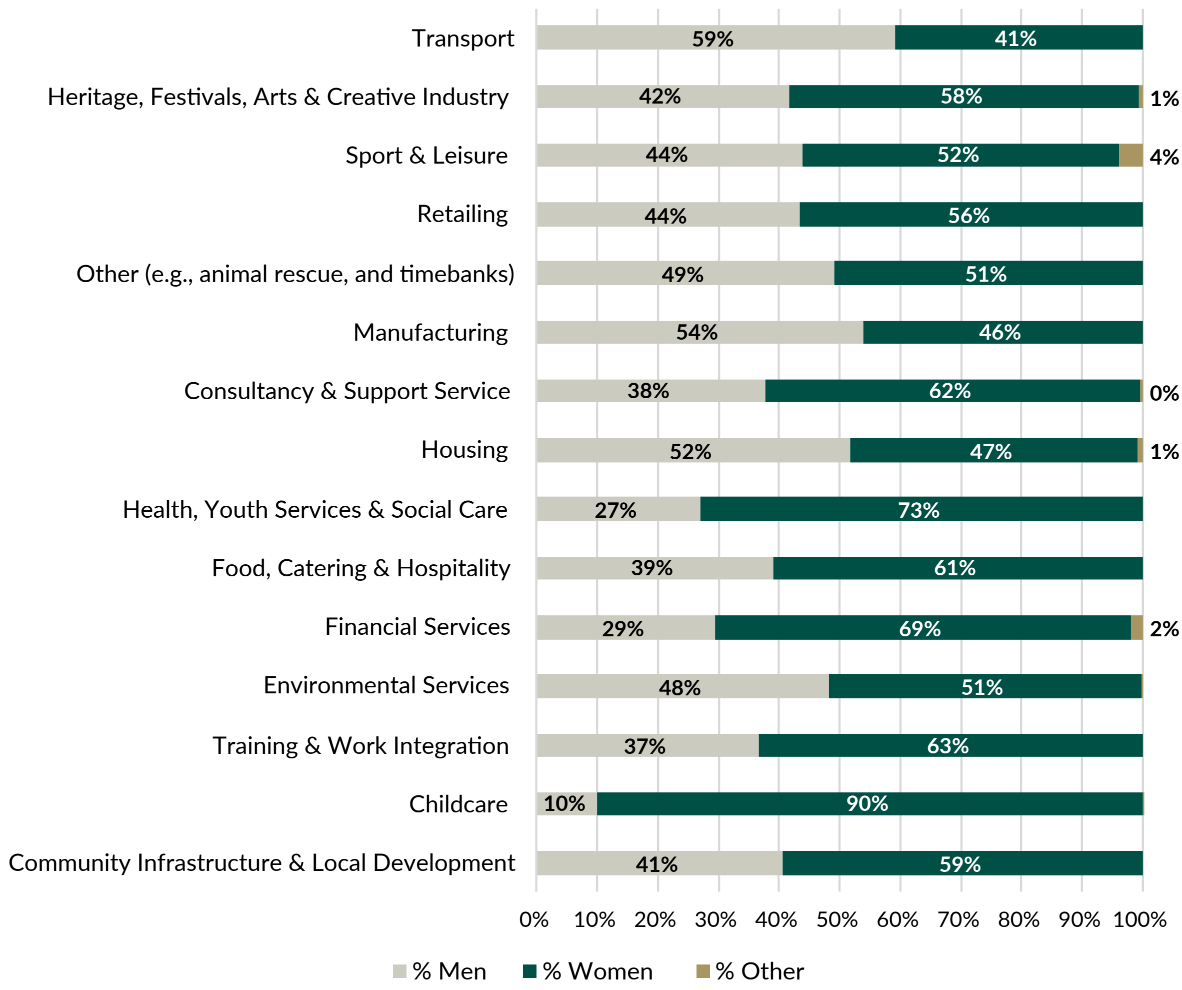
| Sector of activity | % of All Employees |
|---|---|
| Health, Youth Services & Social Care | 44.6% |
| Childcare | 14.2% |
| Training & Work Integration | 9.8% |
| Heritage, Festivals, Arts & Creative Industry | 5.4% |
| Consultancy & Support Services | 5.4% |
| Community Infrastructure & Local Development | 5.1% |
| Housing | 4.1% |
| Environmental Services | 2.7% |
| Sport & Leisure | 2.1% |
| Food, Catering & Hospitality | 2.1% |
| Other (e.g., animal rescue & care, and timebanks) | 1.1% |
| Retailing | 1.0% |
| Transport | 1.0% |
| Financial Services | 0.9% |
| Manufacturing | 0.4% |
| **Total** | **100%** |

### 3.4.2 Gender representation in the workforce

Social enterprises employment is especially relevant for women as they represent 68.8% of the sector workforce. Furthermore, as Figure 3. Social Enterprises gender distribution according to sector of activity. highlights, most sectors of activity that participated in the survey are predominantly composed of women (more than 50% of their workforce). This high proportion of women is especially noted in fields of activity such as Childcare (nine out of ten employees are women); and Health, Youth Services and Social Care (seven out of ten employees are women).

*Figure 3. Social Enterprises gender distribution according to sector of activity.*

*(n=558)*



Considering the type of workforce (full-time/part-time), 68.3% of the full-time workforce are women; this increases to 69.7% regarding part-time employees. These figures show the significant representation of women in the workforce of the social enterprise sector (see Table 19. Women's participation according to type of work. (n=558 organisations).).

*Table 19. Women's participation according to type of work. (n=558 organisations).*

| Sector of activity | % of Women in Full-time | % of Women in Part-time |
|---|---|---|
| Community Infrastructure & Local Development | 59.5% | 60.7% |
| Childcare | 94.7% | 87.7% |
| Training & Work Integration | 63.7% | 63.5% |
| Environmental Services | 49.3% | 54.9% |
| Financial Services | 64.4% | 85.2% |
| Food, Catering & Hospitality | 50.8% | 73.8% |
| Health, Youth Services & Social Care | 72.8% | 73.2% |
| Housing | 52.9% | 43.7% |
| Consultancy & Support Services | 61.9% | 62.6% |
| Manufacturing | 20.0% | 55.2% |
| Other (e.g., animal rescue & care, and timebanks) | 31.9% | 62.3% |
| Retailing | 48.8% | 61.2% |
| Sport & Leisure | 44.8% | 56.6% |
| Heritage, Festivals, Arts & Creative Industry | 56.5% | 59.1% |
| Transport | 40.9% | 41.2% |
| **Total** | **68.3%** | **69.7%** |

### 3.4.3 Age balance

In terms of age, almost half of the employees (48.6%) working in social enterprises are between 31 and 50 years old. Approximately a quarter of the total workforce (23.1%) is 30 or less years old, and the workforce over 50 years old represents 28.3% of the total workforce (see Table 20. Social Enterprises workforce age distribution (n=558 organisations).).

Considering the type of work (full-time/part-time), age group and location, social enterprises provide work opportunities on a part-time basis to people over 50 years old who represent almost one out of three (32.6%) part-time workers in social enterprises. This percentage increases to 43.6% in social enterprises located in rural areas, which in general present a more aged workforce than their urban counterparts (Figure 4).

*Table 20. Social Enterprises workforce age distribution (n=558 organisations).*

| Age | Full-time (FT) | Part-Time (PT) | All Employees (FT+PT) |
|---|---|---|---|
| ≤30 y/o | 23.4% | 22.8% | 23.1% |
| 31-50 y/o | 53.5% | 44.6% | 48.6% |
| >50 y/o | 23.1% | 32.6% | 28.3% |
| **Total** | **100%** | **100%** | **100%** |

*Figure 4. Workforce age distribution according to location and type of work.*

*(n=558)*

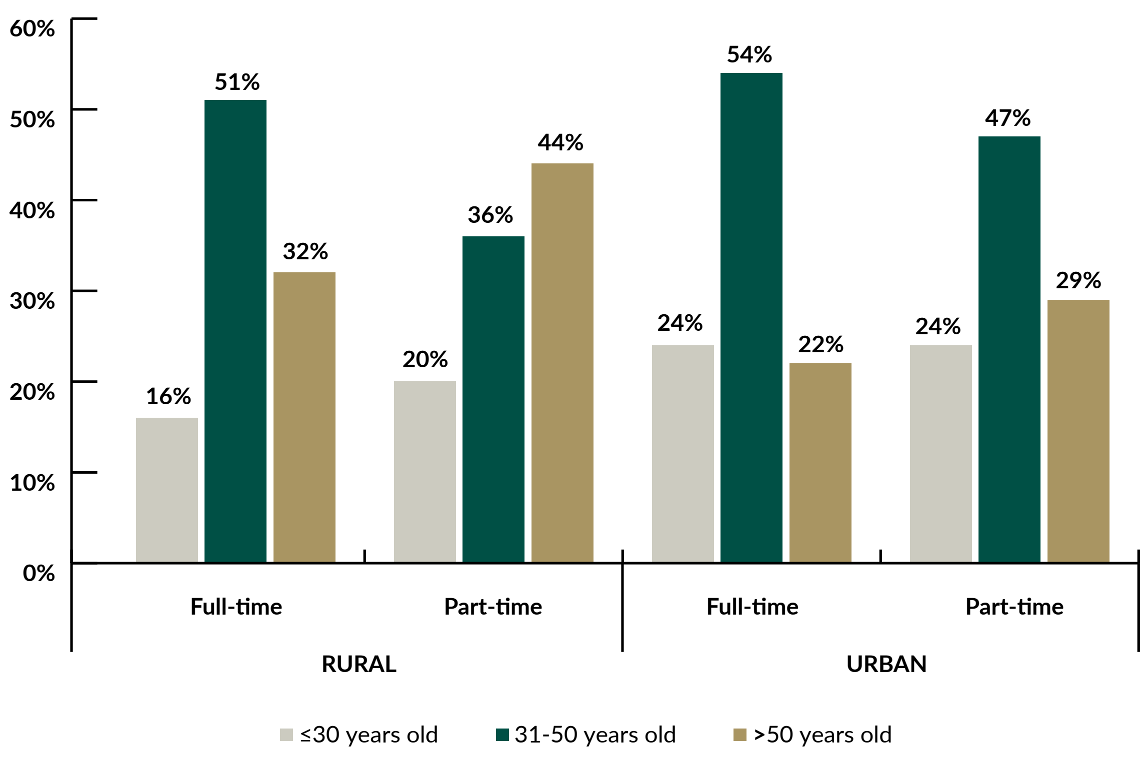
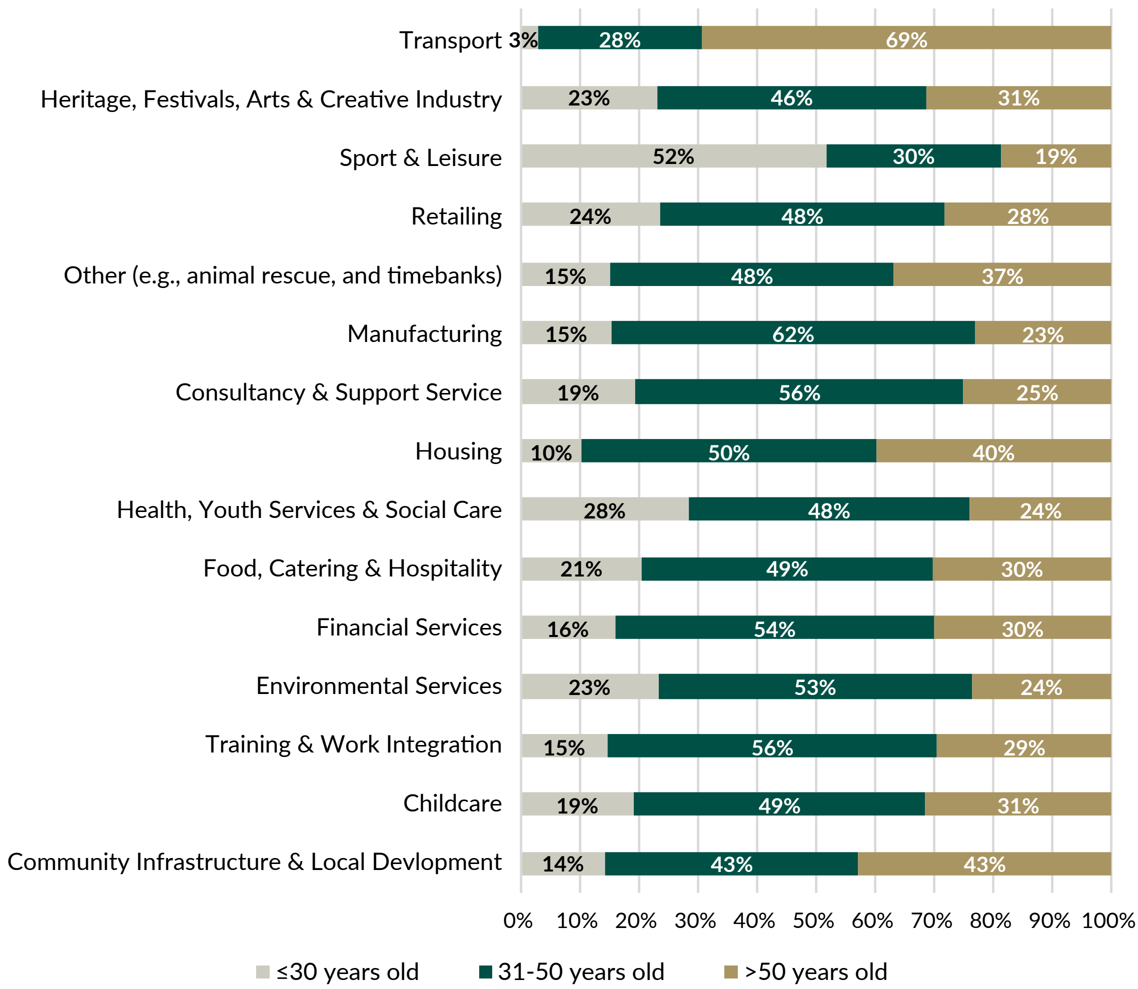


Figure 5. Social Enterprises workforce age distribution according to sector of activity. shows the variations in the age workforce according to the sector of activity. In sectors such as Sports & Leisure, social enterprises employees tend to be younger than in other sectors (half of the workforce is younger than 31 years old). On the contrary, the share of employees older than 50 years is higher in social enterprises in the Community Infrastructure & Local Development (42.8%) and Housing (39.8%) sectors.

*Figure 5. Social Enterprises workforce age distribution according to sector of activity.*

*(n=558)*



### 3.4.4 Participation in labour activation programmes

About six out of ten of the surveyed social enterprises (60.2%), with paid staff, employ people through Activation Labour Market Programmes (ALMP) such as Community Services Programme, Job Initiative TUS, Community Employment Scheme or Rural Social Scheme (64.7% in rural areas and 57.9% in urban locations) (see Table 21. Social Enterprises participation in Activation Labour Market Programmes.).

*Table 21. Social Enterprises participation in Activation Labour Market Programmes.*

| Sector of activity | % Organisations employing through ALMP (n=725) |
|---|---|
| Community Infrastructure & Local Development | 91.2% |
| Other (e.g., animal rescue & care, and timebanks) | 77.8% |
| Food, Catering & Hospitality | 76.5% |
| Heritage, Festivals, Arts & Creative Industry | 69.1% |
| Environmental Services | 69.0% |
| Health, Youth Services & Social Care | 62.7% |
| Transport | 60.0% |
| Retailing | 57.1% |
| Childcare | 52.6% |
| Training & Work Integration | 52.5% |
| Sport & Leisure | 51.9% |
| Housing | 37.8% |
| Consultancy & Support Services | 37.2% |
| Manufacturing | 33.3% |
| **Total** | **60.2%** |

## 3.5 Volunteers and Board Members

Social enterprises often draw on considerable volunteer support. The work of volunteers is critical in developing their activities, taking strategic decisions (voluntary board members) and also developing their connection with communities. An estimated 44,501 active volunteers and 30,324 board members participate in Ireland's social enterprise sector. Therefore, social enterprises mobilise a total of 74,825 volunteers.

Furthermore, on average, each social enterprise is supported by eleven volunteers (excluding board members) (9 in rural organisations and 13 in urban ones). Table 22. Average volunteers in social enterprises by sector of activity and location. highlights the volunteers average among different sectors of activities. Sport & Leisure (26); Food and Catering (25); and Health, Youth Services and Social Care (17) represent the sectors engaging greater numbers of volunteers per organisation.

*Table 22. Average volunteers in social enterprises by sector of activity and location.*

| Sector of activity | Average of volunteers | | |
|---|---|---|---|
| | **All organisations** (n=418) | **Rural** (n=184) | **Urban** (n=234) |
| Community Infrastructure & Local Development | 10 | 11 | 8 |
| Childcare | 2 | 1 | 2 |
| Training & Work Integration | 5 | 5 | 5 |
| Environmental Services | 9 | 10 | 7 |
| Financial Services | 2 | 4 | 2 |
| Food, Catering & Hospitality | 25 | 7 | 54 |
| Health, Youth Services & Social Care | 17 | 9 | 21 |
| Housing | 6 | 2 | 7 |
| Consultancy & Support Services | 6 | 12 | 4 |
| Manufacturing | 6 | 20 | 1 |
| Retailing | 20 | 9 | 27 |
| Sport & Leisure | 26 | 16 | 31 |
| Heritage, Festivals, Arts & Creative Industry | 16 | 12 | 19 |
| Transport | 1 | 1 | 0 |
| **All sectors** | **11** | **9** | **13** |

Volunteering in social enterprises, like employment, is predominantly represented by women (54.0% of the total number of volunteers). In contrast, board members have an inverse representation in the sector (i.e., 53.6% of these directive bodies are made up of men) (Figure 6. Ratio of male and female volunteers within each sector of activity.).

Women represent more than half of volunteers in most sectors in which social enterprises operate. In particular, organisations operating in Health, Youth Services and Social Care (64.2%); and Childcare (62.7%) have a significant presence of women volunteering to develop their activities (over 60%).

*Figure 6. Ratio of male and female volunteers within each sector of activity.*

*(n=418)*

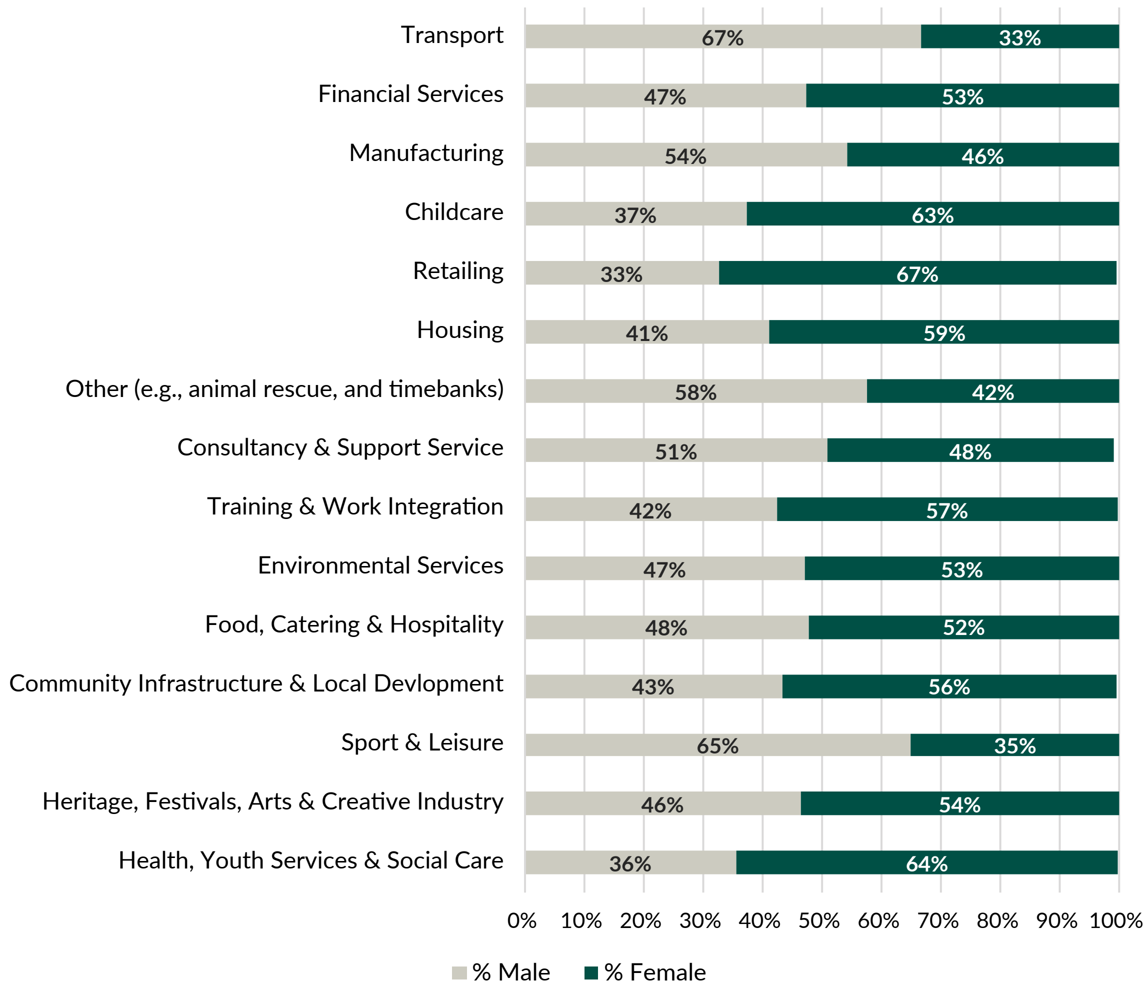
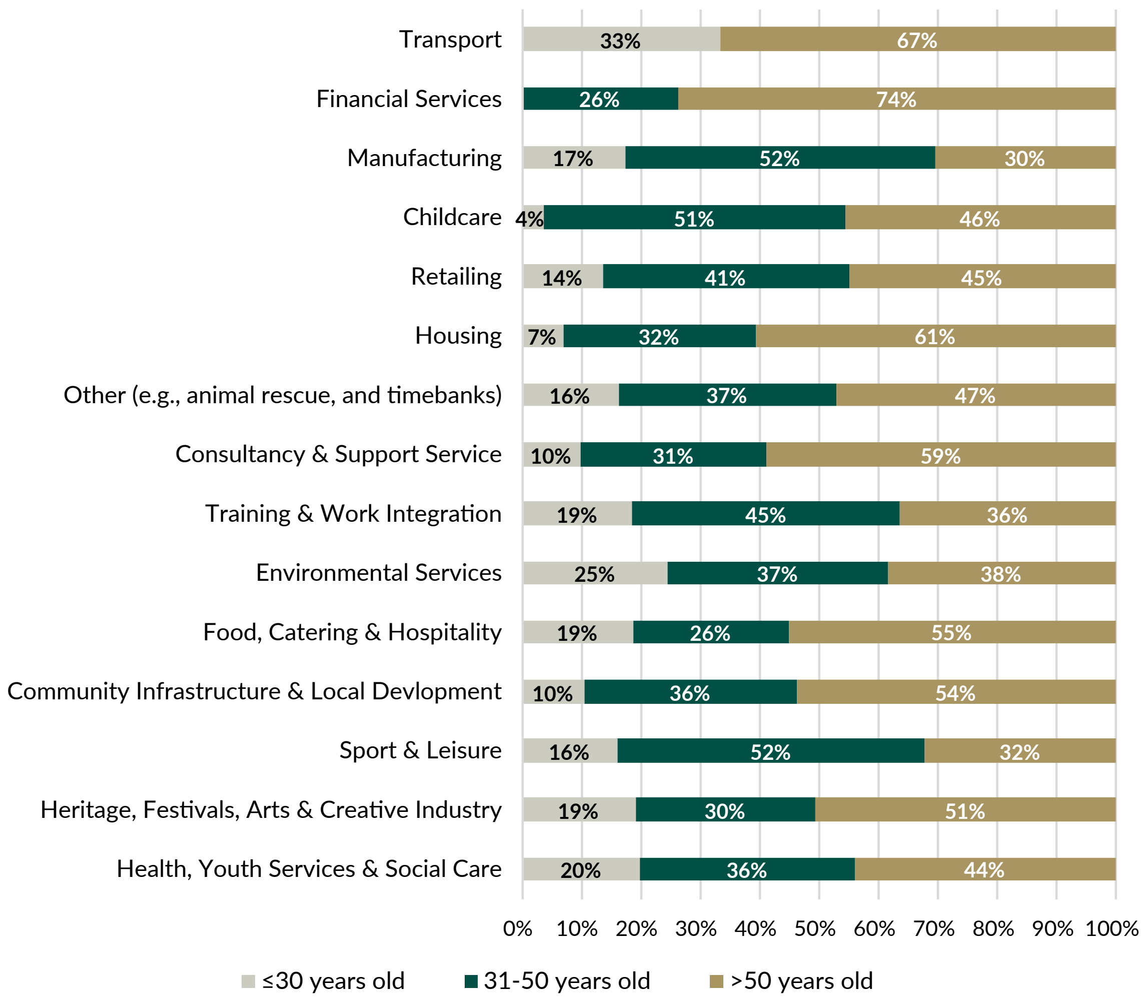


Figure 7. Volunteers age groups within each sector of activity. points to volunteers' age groups per sector of activity. For instance, social enterprises operating in the Food, Catering/Hospitality sector recruit mostly volunteers (73.7%) older than 50. Heritage, Festivals, Arts and Creative Industries (50.7%); and Housing (52.2%) count half of their volunteers between 30-50 years old.

*Figure 7. Volunteers age groups within each sector of activity.*

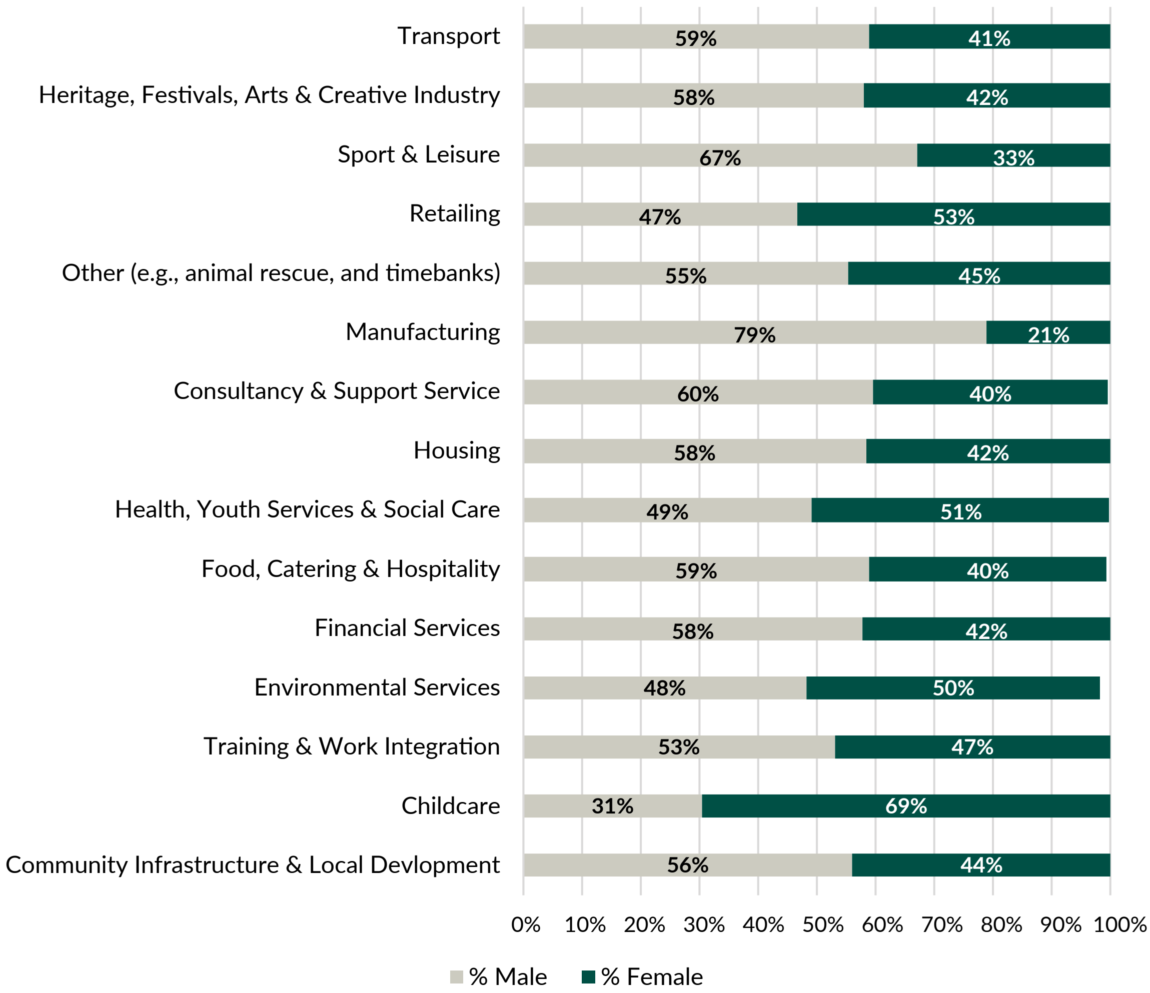
*(n=418)*



Board members in the social enterprise sector are mostly men. However, organisations involved in Childcare (68.5%) notably reported a significant presence of women in their directive bodies (see Figure 8. Ratio of male and female board members within each sector of activity.).

*Figure 8. Ratio of male and female board members within each sector of activity.*

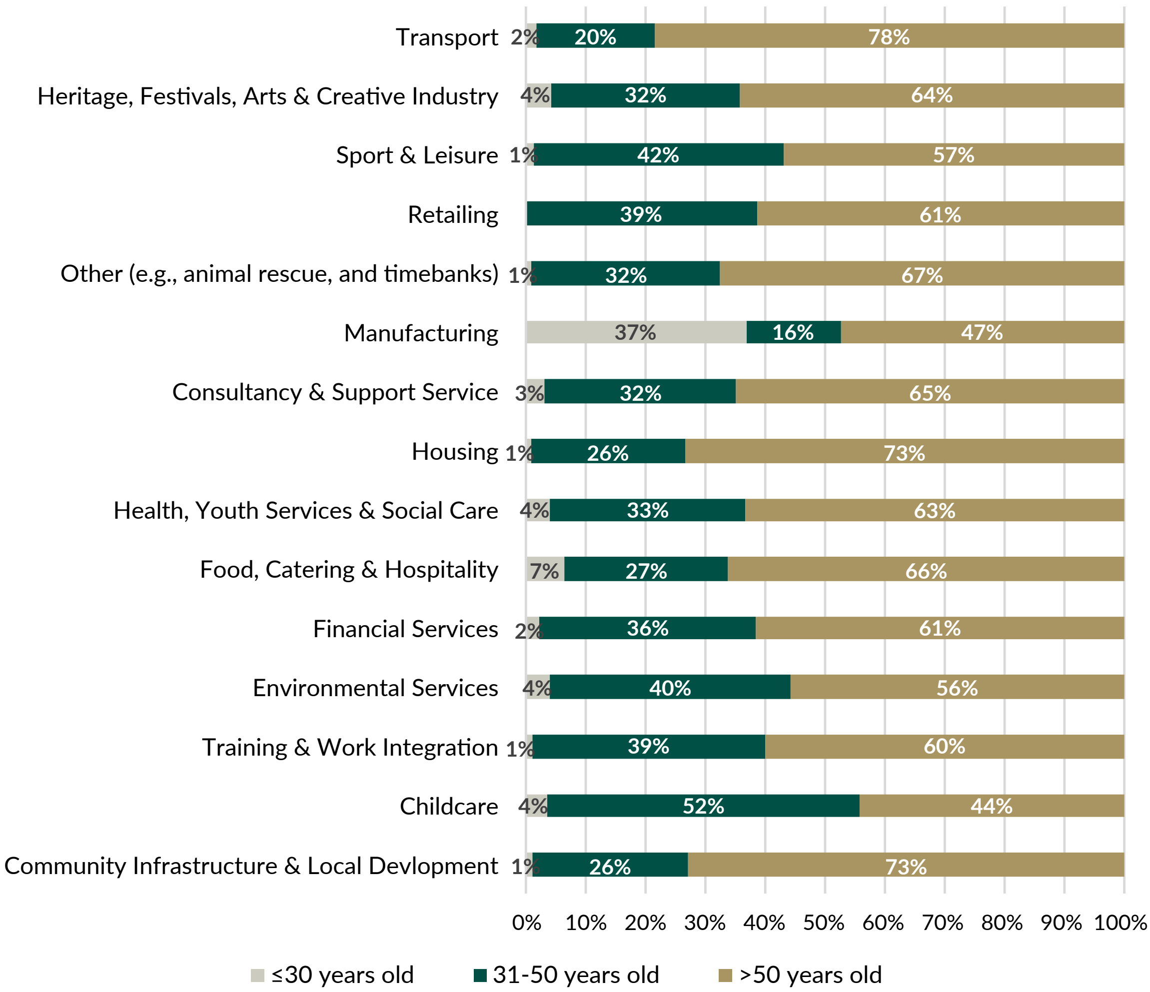
*(n=725)*



Regarding board member composition, Figure 9. Age groups of board members. shows that social enterprises are predominantly composed of people older than 50 years of age.

*Figure 9. Age groups of board members.*

*(n=725)*



## 3.6 Economy and finances

Social enterprises range from microenterprises with very modest income to large trading companies with multi-million annual turnovers. In terms of the contribution of the social enterprise sector to the Irish economy, the total income for the sector is €2.34bn (billions), representing 0.63% of Ireland's GDP.

The social enterprise sector in Ireland is mainly formed by enterprises with modest income, 39.6% of social enterprises present an annual income below €100,000. However, social enterprises whose income is between €100,000 and €500,000 represent over a third of the sector (36.6%). Larger social enterprises still form a relevant part of the sector, with 11.9% of social enterprises presenting an annual income between €500,000 and €1M and another 11.9% presenting an annual income greater than €1M (see Table 23. Annual income social enterprises.).

*Table 23. Annual income social enterprises.*

| Annual income | Total (n=513) |
|---|---|
| Below €50,000 | 28.8% |
| €50,000 to <100,000 | 10.7% |
| €100,000 to < €250,000 | 19.3% |
| €250,000 to < €500,000 | 17.3% |
| €500,000 to < €1M | 11.9% |
| €1M to < €5M | 10.5% |
| >€5M | 1.4% |

The sector presents important income disparities by geographical location. While the median annual income for a social enterprise in Ireland is €180,000, this figure increases to €253,529 in urban social enterprises whereas for rural social enterprises it is €80,317 (Table 24. Median annual income social enterprises.). In rural areas 54% of social enterprises present an annual income below €100,000 compared to 31% in urban areas. On the other side of the spectrum, 17% of social enterprises located in urban areas present annual incomes greater than €1M but only 4% of social enterprises in rural areas (see Table 25), over 90% of these large social enterprises are in rural areas.

*Table 24. Median annual income social enterprises.*

| Median annual income | |
|---|---|
| Total | €180,000 |
| Urban | €253,529 |
| Rural | €80,317 |

*Table 25. Annual income social enterprises. Urban, Rural.*

| Annual income | Urban (n=325) | Rural (n=188) |
|---|---|---|
| Below €50,000 | 23% | 39% |
| €50,000 to <100,000 | 8% | 15% |
| €100,000 to < €250,000 | 18% | 22% |
| €250,000 to < €500,000 | 20% | 13% |
| €500,000 to < €1M | 14% | 8% |
| €1M to < €5M | 15% | 3% |
| >€5M | 2% | 1% |

Social enterprises also present a wide range of (median) annual incomes according to their sector of activity (see Table 26. Median annual income social enterprises.).

*Table 26. Median annual income social enterprises.*

| Sector of activity | Median annual income (€) (n=513) |
|---|---|
| Manufacturing | 31,000 |
| Environmental Services | 80,000 |
| Sport & Leisure | 80,633 |
| Community Infrastructure & Local Development | 116,141 |
| Heritage, Festivals, Arts & Creative Industry | 130,000 |
| Consultancy & Support Services | 132,000 |
| Training & Work Integration | 200,000 |
| Food, Catering & Hospitality | 225,253 |
| Health, Youth Services & Social Care | 282,500 |
| Retailing | 291,000 |
| Housing | 384,821 |
| Childcare | 406,500 |
| Financial Services | 652,596 |
| Transport | 700,000 |

Despite most social enterprises in Ireland being small or medium in terms of their revenue size as mentioned above, there are some large social enterprises with an annual income greater than €1m. These large social enterprises, with an annual income over €1m, are mainly found within the sectors of Health, Youth Services & Social Care; Training and Work Integration and Housing.

The annual income of social enterprises according to their maturity (year of establishment) also varies (see Table 27. Median annual income social enterprises.). Emergent social enterprises typically present a lower (median) annual income than more established social enterprises. The highest median annual income is found in the group of social enterprises established between 11 and 20 years.

*Table 27. Median annual income social enterprises.*

| Maturity (year of establishment) | Median annual income (€) (n=513) |
|---|---|
| 0-4 years | 20,000 |
| 5-10 years | 60,500 |
| 11-20 years | 324,343 |
| >20 years | 250,500 |

## 3.7 Sources of Income

Social enterprises in Ireland tend to use multiple sources of income to develop and maintain their activities (see Figure 10. Social enterprises and sources of income.). This mix of sources of income is consistent with data from international studies on social enterprises (e.g., European Commission, 2020; Defourny & Nyssens, 2021; Gaiger et al., 2019). Within the different sources of income used by social enterprises, income from selling goods and/or services and government grants are the two main sources used by social enterprises, with over 70% of social enterprises using these two sources (see Table 28. Sources of income used by social enterprises.).

*Figure 10. Social enterprises and sources of income.*

*(n=725)*

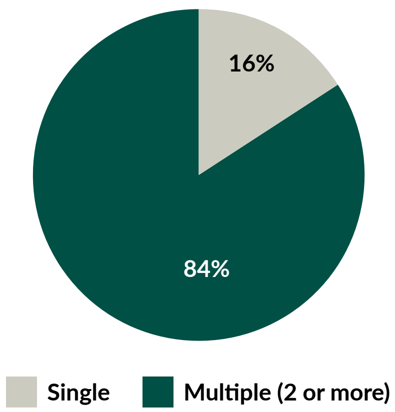


*Table 28. Sources of income used by social enterprises.*

| Sources of income for the organisation | % of social enterprises (n=725) |
|---|---|
| Income from selling goods and/or services | 70% |
| Membership fees | 17% |
| Government grants | 75% |
| Contract for services from a Government Body - open tender process | 8% |
| Contract for services from a Government Body – service arrangement | 22% |
| CSR from corporate organisations and philanthropy | 14% |
| Fundraising from public and members | 39% |
| Other | 19% |

When analysing the relevance of each source of income for the total annual income of social enterprises (see Table 29. Sources of income social enterprises.), the sale of goods/services and government grants each respectively represent over 30% of the total income for social enterprises. These sources combined account for 64% of total income. Despite the great relevance of these sources, other important sources of income for social enterprises are service arrangements with the Government and fundraising which represent approximately 10% and 8% of social enterprises income respectively.

*Table 29. Sources of income social enterprises.*

| Sources of income | % of the total income by source (n=725) |
|---|---|
| Sale goods/services | 31.3 |
| Fees | 4.1 |
| Grants | 32.3 |
| Contract service - open tender | 3.1 |
| Contract service - service arrangement | 10.0 |
| Philanthropy | 2.9 |
| Fundraising | 7.9 |
| Other | 8.4 |

The above-mentioned figures for the whole social enterprise sector in Ireland present variations related to the urban/rural location of social enterprises (see Table 30 and Table 31). In general terms, urban social enterprises present a more diversified portfolio of sources of income but also more focused on acquiring resources from public institutions (in diverse forms) than social enterprises in rural areas - 46.8% of income from urban social enterprises derive from grants and contracts for services with the Government, 41.9% in the case of rural social enterprises.

Interestingly, although less social enterprises in rural areas use the sale of goods/services as a source of income (66% compared to 72% by urban social enterprises), this source represents 32.3% of the total income for rural social enterprises compared to 30.7% for their urban counterparts. There are also important differences in the use of sources of income such as membership fees, contract for services from the Government, and CSR from corporate organisations and philanthropy. These sources of income are more used by urban social enterprises. In the case of contracts with the Government in the form of service arrangements, this source of income represents 12.3% for urban social enterprises and 6.3% for social enterprises located in rural areas[18].

However, fundraising from public and members is more widely used by rural social enterprises, this source representing almost 10% of rural social enterprises income compared to 6.7% for their urban counterparts.

*Table 30. Sources of income social enterprises.*

| Sources of income | Urban (n=442) | Rural (n=283) |
|---|---|---|
| Income from selling goods and/or services | 72% | 66% |
| Membership fees | 20% | 13% |
| Government grants | 74% | 75% |
| Contract for services from a Government Body - open tender process | 10% | 6% |
| Contract for services from a Government Body – service arrangement | 27% | 16% |
| CSR from corporate organisations and philanthropy | 16% | 10% |
| Fundraising from public and members | 34% | 46% |
| Other | 18% | 20% |

*Table 31. Percentage of total income by source of income.*

| Sources of income for the organisation | Urban SEs % of the total income by source (n=442) | Rural SEs % of the total income by source (n=283) |
|---|---|---|
| Sale goods/services | 30.7 | 32.3 |
| Fees | 5.3 | 2.3 |
| Grants | 31.3 | 33.8 |
| Contract service - open tender | 3.2 | 2.8 |
| Contract service - service arrangement | 12.3 | 6.3 |
| Philanthropy | 2.8 | 3.0 |
| Fundraising | 6.7 | 9.9 |
| Other | 7.6 | 9.7 |

Despite Government grants being an important source of income for social enterprises, it is important to note this source represents less than 50% of the income of social enterprises in every sector of activity. It is highest for Childcare for which grants represent 46.5% of total income of social enterprises within the sector.

18 Please note that a manual exercise was undertaken with all respondents who recorded zero income from selling goods or services. Organisations were only included where the other income was in fact valid trading income or the organisation was a start-up (3 years or less).

# 4 Conclusions and Perspectives

## 4.1 Key findings

The key information which emerges from the exercise is as follows:

*Composition of sector:*

- 4,335 social enterprises in Ireland (8.5 per 10,000 people)
- 68% of social enterprises concentrated in four sectors: Childcare; Community Infrastructure & Local Development; Health, Youth Services & Social Care; Heritage Festivals, Arts & Creative Industry
- 77% of social enterprises operating in more than one economic activity
- 48% of social enterprises +20 years; 16% 0-4 years
- 77% of social enterprises registered as CLG

*Geographical coverage and reach:*

- 43% of social enterprises are in rural areas (10.5 per 10,000 inhabitants)
- 57% of social enterprises are in urban areas (8.3 per 10,000 inhabitants)
- 75% of social enterprises focus on their localities, 15% operate internationally

*Economy and finances*

- €2.34bn is the contribution of the social enterprise sector to economy
- 39.6% of social enterprises have an annual income of less than €100,000; 11.9% of social enterprises have an annual income of more than €1M
- €180,000 is the median annual income of a social enterprise
- 84% of social enterprises use multiple sources of income
- 64% of social enterprise income comes from a mix of trading good/services and government grants

*Employment:*

- 79,114 of employees within the social enterprise sector (84,382 including contractors)
  - » 46.9% part-time workforce
  - » 68.8% of social enterprises workforce are women (of which 69% work part-time)
- 60.2% of social enterprises, with paid staff, employ people through Activation Labour Market Programmes (ALMP), especially in rural areas (65%)

*Volunteers*

- 44,501 volunteers (excluding board members) within the social enterprise sector
  - » 46% of social enterprise volunteers are over 50 years old
  - » 54.0% of the volunteers are women
- 30,324 board members within the social enterprise sector
  - » 53.6% of these directive bodies are made up of men
  - » 63% of board members over 50 years old

## 4.2 Conclusions, opportunities and challenges for the sector

Social enterprises in Ireland are generating meaningful social, economic and environmental impact. Their mission-focus is particularly important in the context of the green transition and in realising Ireland's objectives related to job creation, inclusiveness, regional development and sustainability.

The data indicates the diversity of the sector, the cross-sectoral work and resourcefulness of social enterprises, the opportunities and challenges related to employment and volunteering, the contribution to the economy and the small size but increasing relevance and growing potential of this dynamic sector.

*Diversity and common identity*

The social enterprise sector in Ireland is characterised by its diversity. Social enterprises operate in a wide range of sectors, from childcare to renewable energy. This diversity also applies to geographical coverage; social enterprises are spread across every county of Ireland and across urban and rural areas. In terms of income, social enterprises annual income ranges from a few thousand euros to multi-million.

On the one hand, this diversity shows the vibrancy and relevance of social enterprises in tackling diverse complex challenges that Irish society and the economy are currently facing. It also shows the potential of social enterprises to provide work opportunities to different demographics, both in urban and rural areas. On the other hand, this diversity also presents challenges. A key challenge is the development of a common identity within a diverse sector. Social enterprises present some common features, such as pursuing social and/or environmental goals and developing economic activities, but social enterprises present different needs and interests related to their sector of activity, location, size, and business cycle.

*Multi-activity and cross-sectoral*

Many social enterprises in Ireland are typically engaged in multiple activities and provide multiple services; thus, their impact usually goes beyond their primary activity. Many also combine public and private sector resources to achieve their objectives/goals and to assist their financial sustainability. This mix of resources represents a key aspect of the financial sustainability of social enterprises but is also an indicator that these organisations tend to blur the boundaries between the public and (for-profit) private sectors.

*Employment, decision-making and vulnerability*

The social enterprise sector presents a workforce represented mainly by women. Besides contributing to women's employment creation, the sector also provides work opportunities to vulnerable groups using activation labour market programmes (especially in rural areas) and through enterprises whose main aim is work integration. It remains for future exercises to analyse the implications of an apparent dependency on these labour market activation supports. In addition, in rural areas, social enterprises represent an important labour niche for the over-50 population. These features represent notable contributions of social enterprises to Irish employment and society.

However, this report also shows how the work provided by social enterprises shows a high proportion of part-time employment, especially significant in the case of women. Moreover, while women represent the majority of the social enterprises' workforce, this is not translated into strategic decision-making roles (boards), mainly occupied by men, especially those aged 50 years or more. This disproportionate number of men and older people on boards represent a challenge for the social enterprise sector.

*Small, relevant, and growing?*

The social enterprise sector crosses boundaries with other more traditional and well-established sectors such as the voluntary, community and non-profit sectors but also with the (for-profit) enterprise sector. This first baseline data collection exercise for the social enterprise sector in Ireland shows a relatively small size (formed by 4,335 social enterprises) in comparison to the for-profit business, formed by 278,862 organisations (CSO, 2022); the non-profit sector, formed by 34,331 organisations (Benefacts, 2021) and the charity sector, composed of 13,903 organisations (Charities Regulator, 2023).

Despite its size, the social enterprise sector is increasingly relevant for addressing a wide range of challenges Ireland currently faces. Social enterprises contribute to providing (innovative) solutions that combine social, economic, and environmental aims, thus enhancing sustainable development. This contribution, as this report shows, combines private and public resources and staff with volunteer labour and provides opportunities to vulnerable populations and geographically disadvantaged places. This relevant contribution to a more inclusive and sustainable development is not only acknowledged by the National Social Enterprise Policy, but also by other national policies such as Our Rural Future, Rural Development Policy 2021-2025 and the recently published White Paper on Enterprise 2022-2030. This aligns with increasing international recognition of the relevance and potential of social enterprises from institutions such as the European Commission (European Commission, 2021), the OECD (OECD, 2022) or the International Labour Organisation (ILO, 2022).

This increasing recognition points towards the growing role of social enterprises. This report provides a comprehensive picture of the social enterprise sector in Ireland in 2022; of particular relevance going forward will be to develop frameworks that enhance the sector's potential and to track its evolution and impact on society, the environment, and the economy.

## 4.3 Lessons learned

The main aims of this baseline data collection for the social enterprise sector in Ireland project were to design and implement a methodology to gather nationwide data and to establish a baseline picture of the social enterprise sector in Ireland, including its size, sectors of activity, geographical coverage, nature and levels of staffing, volunteer engagement, contribution to the economy and sources of income.

Beyond these main objectives, the design and execution of this project provides a number of valuable learnings and insights that might enhance future data collection exercises:

- Given the lack of official registers on social enterprises in Ireland, lists of member organisations provided by social enterprise intermediaries were used to build the social enterprise population baseline. To mitigate a potential selection bias, a comprehensive consultation process with stakeholders was carried out in the first phase of the project. Feedback and validation were also continuously discussed with DRCD. Furthermore, different project team members conducted extensive deduplication and a careful inclusion/exclusion exercise.
- Several inclusions/exclusions were agreed as part of the methodology. Credit unions are recognised as being an integral part of the broader social economy. However, the credit union sector in Ireland is sizable and is regulated by the Central Bank of Ireland with data readily available. Therefore, they were omitted from this exercise. In the case of Section 38, Section 39 and Section 56 health/social care organisations and sporting organisations[19], it was agreed that where these organisations were identified by social enterprise support organisations and/or completed the survey and self-declared as social enterprises, they were included.
- The way in which the baseline population of social enterprises in Ireland was built might lead to the conclusion that the baseline population is a conservative figure. Some lists were not available from intermediaries, and some intermediaries reported that their lists were conservative. The inclusion in the baseline population of about 250 social enterprises that completed the survey, but which were not previously included in lists provided by intermediaries, suggests that the initial population baseline did not cover all social enterprises.

19 The HSE funds a range of service providers either under section 38 or 39 of the Health Act 2004. Section 38 arrangements involve organisations that are funded to provide a defined level of service on behalf of the HSE while under Section 39 the HSE grant aids a wide range of organisations to a greater or lesser extent. Section 56 organisations provide services funded by Tusla under Section 56 of the Child and Family Agency Act 2013.

- The quality of the information provided by intermediaries in terms of location and nature of activity varied. Since this was not envisaged in the early stages, it added to the Consortium's workload in filling gaps, sourcing, and standardising the data. This needs to be considered and anticipated for future bottom-up exercises relying on a significant involvement of intermediaries.
- The lack of publicly available financial information on social enterprises (contrary to other experiences, such as the Social Enterprise Census in Scotland) makes it challenging to accurately assess their financial situation (as abridged accounts are often what is publicly available) beyond what was reported through the survey (i.e., income and its sources). This can have an effect when conducting extrapolation/estimations of the financial situation from the sample to the general population, which need to be undertaken with caution. The introduction of the Statement of Recommended Practice (SORP) could impact on this, given the number of social enterprises with charitable status, however this will only apply to charities with an income greater than €250,000. For applicable charities, SORP sets out standards for financial statements, including more detail on income and expenditure[20].
- The lack of standardisation with other jurisdictions, e.g., Scotland, regarding the inclusion/exclusion of specific types of organisations, e.g., the exclusion of credit unions for this exercise makes some figures challenging to compare at the international level, particularly regarding income and employment.
- Survey fatigue among social enterprises proved to be a hindering factor for optimal completion of data collection. Despite the response rate being 16.7%, the sample size for some sectors of activity, such as manufacturing, retailing, financial services and transport, was small (10 cases or less)—figures for these sectors need to be taken with caution and no interpretation of these sectors has been included in the main text of the report. To deal with this challenge in future exercises, efforts must continue to ensure stakeholder buy-in through specialised professional communication of the benefits of the data collection exercise.

This baseline data collection project can establish solid pillars and set realistic expectations for the recognition, promotion, and policy development of the social enterprise sector in Ireland. It provides the first comparable data to draw upon for future (more developed) exercises. Further fine-grain and more in-depth analysis of subsectors of activity, spatial dimension, financial performance, and governance, among other variables, remain of interest for future endeavours.

Lastly, it is important to acknowledge that this research represents a collective and collaborative endeavour of the social enterprise sector in Ireland. This baseline data collection exercise represents another milestone for the recognition and development of the sector, informing policy making by providing a 'snapshot of the sector' with key data about its strengths and contributions to society, the economy, and the environment, and also about its current challenges.

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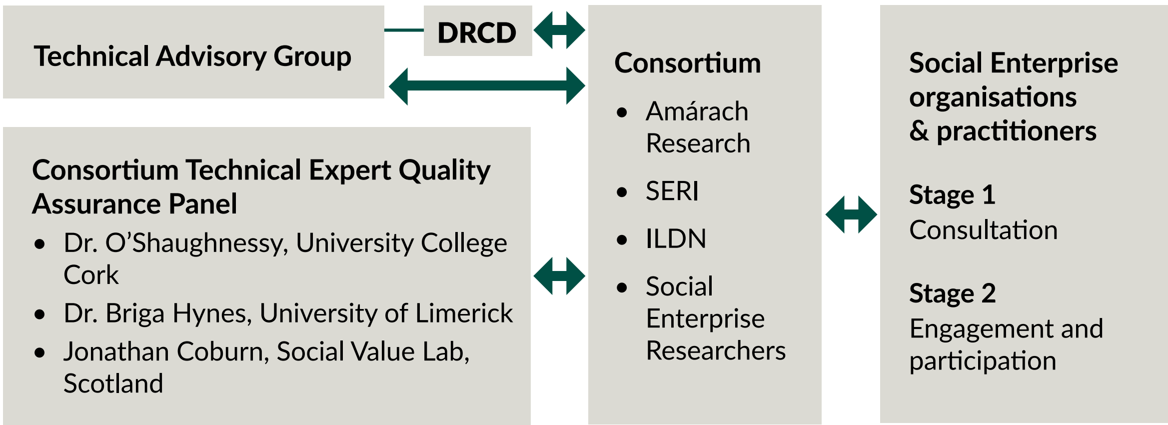
# Appendix 1. Project Governance




## The DRCD Technical Advisory Group

Throughout the project The Department of Rural and Community Development received support from its Technical Advisory Group TAG). The members of the TAG are listed below

### Technical Advisory Group

- Richard Gavin, (Chairperson), DRCD
- Michael Brennan, Central Statistics Office
- Siobhán Cafferty, Pobal
- Sheila Cannon, Trinity College Dublin
- Ivan Cooper, The Wheel
- Jordana Corrigan, Trinity College Dublin
- Pauline Gannon, Social Impact Ireland
- Chris Gordon, Irish Social Enterprise Network
- Martin Quigley, Pobal

# Appendix 2. Questionnaire

Social Enterprise
Data Collection Exercice
2022

An Roinn Forbartha Tuaithe agus Pobail
Department of Rural and Community Development

amárach research

SERI SOCIAL ENTERPRISE REPUBLIC OF IRELAND

ILDN IRISH LOCAL DEVELOPMENT NETWORK

## Introduction

A Baseline social enterprise research project is being delivered on behalf of the Department of Rural and Community Development by Amárach Research, in partnership with Social Enterprise Republic of Ireland (SERI) and the Irish Local Development Network (ILDN).

This exercise will identify key data such as the total number of social enterprises in Ireland, their regional spread, the primary sectors they are active in, their staffing levels and traded income.

This will ensure the Department is in a much better position to support the sector and develop social enterprise policy, with a strong and robust evidence base.

The data provided in this survey will be used only for research purposes and will not be used in relation to any funding applications. No information will be published that could identify your organisation.

The findings of this project will give greater insight into the sector, underpinning policy development and assist in the provision of supports that may be available to the sector in the future.

The project will be completed by the end of the year and the results published on www.gov.ie

If you have any queries, email us at project.team@sedatacollection.ie

**Is your organisation eligible to participate in the research?**

The official definition of a Social Enterprise is as follows:

A Social Enterprise is an enterprise

(i) whose objective is to achieve a social, societal, or environmental impact, rather than maximising profit for its owners or shareholders.

(ii) which pursues its objectives by trading on an ongoing basis through the provision of goods and/or services,

(iii) which reinvests surpluses into achieving social objectives.

(iv) which is governed in a fully accountable and transparent manner and is independent of the public sector

(v) which if dissolved, should transfer its assets to another organisation with a similar mission.

(National Social Enterprise Policy for Ireland 2019-2022)

**Using this definition is your organisation a social enterprise?**

| | |
|---|---|
| Yes | Continue |
| No | Thank and close |
| Unsure | Continue |

## About the Organisation

**ASK ALL**

Q.1 What is the name of your organisation?

**ASK ALL**

Q.2 Is your organisation known by any other name(s) or does it trade as any other entity?

| | |
|---|---|
| Yes | 1 |
| No | 2 |

**ASK THOSE WHO CHOOSE CODE 1 (YES) at Q2**

Q.2a What are those names or entities called?

**ASK ALL**

Q3. What is the postal address of your organisation?

Please provide main details first e.g.: street, locality, then select county on the next question.

**ASK ALL**

Q3a. Please select county

| **SHOW LIST OF COUNTIES** |
|---|

**ASK ALL**

Q.4 What is the Eircode of your organisation?

| |
|---|
| |
| Do not know |

**ASK ALL**

Q.5 Is your organisation a subsidiary of, or part of, a bigger group or entity?

| | |
|---|---|
| Yes | 1 |
| No | 2 |

**ASK THOSE WHO CHOOSE CODE 1 (YES) AT Q5**

Q.5a What is the name of the parent organisation?

**ASK ALL**

Q.6 What is the overarching mission or social purpose of your organisation? This can be a formal mission statement or simply a description of your organisation's goals.

ASK ALL

**Q.7 What types of trading activity(ies) does your organisation engage in?**

**Please select your main activity where 1 means “Primary activity”, 2 for second activity etc**

*Drop Down menu (Based on Scottish Census 2019 and added in a few)*

| ROTATE | |
|---|---|
| Arts & Creative Industries | 1 |
| Early Learning and Care & School Aged-Childcare | 2 |
| Community centres and halls | 3 |
| Disability support and services | 4 |
| Eldercare | 5 |
| Education, Training & Employment and Work Integration | 6 |
| Environment & Circular Economy | 7 |
| Financial Services | 8 |
| Food, Catering & Hospitality | 9 |
| Health & Social Care | 10 |
| Information, Consultancy and Support Services | 11 |
| Manufacturing | 12 |
| Producing renewable energy | 13 |
| Rehabilitation of offenders | 14 |
| Retailing | 15 |
| Social Isolation | 16 |
| Sport & Leisure | 17 |
| Transport | 18 |
| Tourism, Heritage & Festivals | 19 |
| Youth services | 20 |
| Housing/Property | 21 |
| Other (please specify) | 22 |

ASK ALL

**Q.8 In what year was your organisation founded?**

| | | | |
|---|---|---|---|
| | | | |

ASK ALL

**Q.9 Is the geographic focus of your organisation's activity or remit...**

**Tick all that apply**

| | |
|---|---|
| Local (i.e. immediate locality) | 1 |
| County | 2 |
| Provincial/Regional | 3 |
| National | 4 |
| International | 5 |

## Running the Organisation

ASK ALL

**Q.10 Does your Organisation have employees?**

| | |
|---|---|
| Yes | 1 |
| No | 2 |

ASK THOSE WHO CHOOSE CODE 1 (YES) AT Q10

**Q.11 How many of your employees are:**

(i) full-time (i.e. 30 hours a week or more)

(ii) how many are part-time (i.e. less than 30 hours a week) and

(iii) how many are contractors?

**Please provide exact number.**

| | Exact number |
|---|---|
| Full-time employees | |
| Part-time employees | |
| Contractors | |

### ASK THOSE WHO CHOOSE CODE 1 (FULL-TIME EMPLOYEES) AT Q11

**Q11a.** **Thinking of your *full-time employees*, can you estimate what percentage fall into the following categories?**

**If none type 0%. Total must add up to 100%**

| | % |
|---|---|
| Male | |
| Female | |
| Other | |
| Aged 30 or under | |
| Aged 31 to 50 | |
| Aged 50+ | |

### ASK THOSE WHO CHOOSE CODE 2 OR 3 (PART-TIME EMPLOYEES / CONTRACTORS) AT Q11

**Q11b.** **Thinking of your *part-time employees and contractors*, can you estimate what percentage fall into the following categories?**

**If none type 0%. Total must add up to 100%**

| | % |
|---|---|
| Male | |
| Female | |
| Other | |
| Aged 30 or under | |
| Aged 31 to 50 | |
| Aged 50+ | |

### ASK THOSE WHO CHOOSE CODE 1 (YES) AT Q10

**Q.12** **Are any employees employed through labour activation programmes (e.g. CSP; JI; TUS; CE or RSS).**

| | |
|---|---|
| Yes | 1 |
| No | 2 |

**ASK THOSE WHO CHOOSE CODE 1 (YES) AT Q12**

**Q12a.** **Thinking of your employees who are employed through labour market activation (or other) programmes, can you estimate what percentage fall into the following categories?**

**If none type 0%. Total must add up to 100%**

| | % |
|---|---|
| Male | |
| Female | |
| Other | |
| Aged 30 or under | |
| Aged 31 to 50 | |
| Aged 50+ | |

**ASK ALL**

**Q.13** **How many Volunteers work in the organisation (excluding Board Members)?**

| | Number |
|---|---|
| Volunteers | |

**ASK THOSE WHO ENTER 1+ AT Q13**

**Q13a.** **Thinking of your *Volunteers who are not Board Members*, can you estimate what percentage fall into the following categories?**

**If none type 0%. Total must add up to 100%**

| | % |
|---|---|
| Male | |
| Female | |
| Other | |
| Aged 30 or under | |
| Aged 31 to 50 | |
| Aged 50+ | |

ASK ALL

**Q.14 How many members do you have on your Board?**

| | Number |
|---|---|
| Board Members | |

ASK THOSE WHO ENTER 1+ AT Q14

**Q14a. Thinking of your *Board Members*, can you estimate what percentage fall into the following categories?**

**Please type in 0 for none. Total must add up to 100%**

| | % |
|---|---|
| Male | |
| Female | |
| Other | |
| Aged 30 or under | |
| Aged 31 to 50 | |
| Aged 50+ | |

## Organisation Funding and Income

ASK ALL

**Q.15 What was your organisation's total annual income for 2019/2020/2021?**

**By annual income we mean all funds used for and through the organisation's activities.**

| | '000s (Use a rounded figure) | Do not know |
|---|---|---|
| (a) 2019 | | |
| (b) 2020 | | |
| (c) 2021 | | |

ASK ALL

**Q.16a. Taking the most recent year for which figures are available, which of the following are sources of income for the organisation?**

**Tick all that apply**

**SHOW CODES SELECTED AT Q16a**

**Q. 16b. What percentage of the total income does each income source constitute?**

| | (i) Sources of income | (ii) % (total must add up to 100%) |
|---|---|---|
| Income from selling goods and/or services | | |
| Membership fees | | |
| Government grants | | |
| Contract for services from a Government Body - open tender process | | |
| Contract for services from a Government Body – service arrangement | | |
| CSR from corporate organisations and philanthropy | | |
| Fundraising from public and members | | |
| Other (Please specify: _____________) | | |
| | | 100% |

**ASK ALL**

**Q.17 Is your organisation registered in any of the following ways? Tick all that apply**

| | Yes | No | Don't Know |
|---|---|---|---|
| With the Charity Regulator (CRA Number) | | | |
| With the Revenue Commissioners (CHY Number) | | | |
| For VAT? | | | |
| With the Companies Registration Office (CRO) | | | |
| As a section 38 organisation under the Health Acts? | | | |
| As a section 39 organisation under the Health Acts? | | | |
| As a section 56 organisation under the Health Acts? | | | |
| As an Approved Housing Body | | | |
| Irish Association for Community Training Organisations | | | |
| Other (please specify__________________) | | | |

ASK ALL

**Q18 What is the legal form or structure of your organisation? Please tick one**

| | |
|---|---|
| Company Limited by Guarantee (without share capital) | |
| Co-operative (Industrial and Provident Society) | |
| Company Limited by Share Capital | |
| Designated Activity Company Limited by Shares | |
| Designated Activity Company Limited by Guarantee | |
| No Legal Form (Unincorporated Association) | |
| Sole Trader | |
| Hybrid/Other (please specify) | |
| Don't Know | |

**Do you wish your organisation to be included in a raffle for 3 x €500 prizes as a thank you for taking the time to complete the survey?**

**If yes, please provide contact details on the next screen.**

| | |
|---|---|
| Yes | |
| No | |

## Follow Up

**If we need to follow up on any aspect of the information supplied in the questionnaire, who would be the best person in the organisation to contact?**

**Please provide name:**

**Email address:**

THANK YOU FOR YOUR SUPPORT FOR THIS VITAL PROJECT

***If you have any queries, please do not hesitate to contact the project team via email project.team@sedatacollection.ie***

***Thank you!***

Rialtas na hÉireann
Government of Ireland