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In collaboration with the Schwab  
Foundation's Advisory Group on  
Social Enterprise Data

# Collecting Data on Social Enterprises: A Playbook for Practitioners

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# A letter from the Advisory Group on Social Enterprise Data

Social enterprises are at the forefront of addressing some of the world's most pressing social and environmental challenges. These purpose-driven organizations are delivering inclusive and sustainable goods and services, generating employment – particularly for those marginalized or excluded from mainstream opportunities – and fostering sustainable economic growth.

However, the lack of consistent data collection – globally – continues to hamper our efforts to both grow the sector and improve its visibility. Profound gaps remain in how social enterprise data is collected and compared across different regions. Challenges persist in data availability, quality and standardization, which makes it difficult to measure the full economic, social and environmental contributions of social enterprises – on a national, regional and global scale.

It is this shared commitment to knowledge and collective learning that brought us together as an advisory group. Convened by the Schwab Foundation, we are a coalition of civil society organizations, academic institutions, public sector leaders and private sector entities. Our aim is to develop a more harmonized approach to social enterprise data collection – one that is adaptable across diverse country contexts.

Through this effort, we hope to foster greater collaboration in social enterprise research and promote a level of consistency that enables meaningful global comparison.

This report is one of the first that the coalition will produce, and focuses specifically on the collection of data through surveys. It draws on lessons from over 25 organizations, some with more than 30 years of experience in the sector.

Alongside this report, a standardized set of survey questions has been published – identified as the most commonly used in social enterprise data collection – to enhance comparability across datasets. We encourage the adoption of these questions, with necessary adaptations to local contexts, to strengthen global understanding and visibility of social enterprises.

We extend our sincere gratitude to all contributors – from social enterprise leaders and policy-makers to researchers and private sector champions – who are working collectively to build a more harmonized and impactful approach to social enterprise data. We hope this playbook serves as a valuable resource for all of us dedicated to strengthening the role of social enterprises in building a more inclusive and sustainable world.



Access the standardized set of survey questions [here](#)

# Executive summary

Improving the quality, consistency and comparability of social enterprise data can enhance the understanding of social enterprises and amplify their impact.

Social enterprises play a crucial role in driving inclusive and sustainable economic growth worldwide. These organizations, which prioritize social and environmental impact over profit, vary widely in structure and purpose – from small, community-driven businesses to large-scale enterprises addressing systemic challenges. However, despite their growing significance, the availability of reliable and comparable data on social enterprises remains inconsistent across regions. Addressing these data gaps is critical for governments, businesses, investors and ecosystem enablers to develop informed policies, foster investment and create a supportive environment for social enterprises to thrive.

Recognizing the need for better data, the Schwab Foundation for Social Entrepreneurship has established the Advisory Group on Social Enterprise Data, a collaborative platform comprising experts from industry, academia, the public sector and the private sector. The group's mission is to improve the quality, consistency and comparability of social enterprise data worldwide, beginning with demographic data collected through surveys.

Surveys have long been the primary tool for gathering social enterprise data. As a widely used methodology, they form the foundation of many research initiatives undertaken by governments, membership organizations and funders. However, despite their prevalence, challenges remain in ensuring data comparability due to differences in definitions, research methodologies and question formats across studies.

To address this, the advisory group mapped over 30 surveys, analysing more than 700 questions to identify common themes and areas for alignment. This analysis revealed eight key categories of social enterprise data:

1. Basic identifying information.
2. Organizational characteristics.
3. Workforce and leadership demographics.

4. Social and environmental goals.
5. Financial performance and economic impact.
6. Barriers and challenges.
7. Operational practices and behaviours.
8. General sentiment and future outlook.

To support data harmonization efforts, the advisory group has developed a set of standardized survey questions, published separately on the website of the Global Alliance for Social Entrepreneurship.<sup>1</sup> These questions serve as a practical resource for organizations collecting social enterprise data, facilitating alignment across different research initiatives.

This playbook on social enterprise data collection, informed by the advisory group's work, provides guidance for practitioners on effectively designing and conducting surveys. It covers five interlinked steps: defining the purpose of data collection, co-designing surveys, collecting data, storing data securely and publishing findings. While surveys remain a valuable tool, the playbook also explores their limitations and introduces complementary methodologies, such as integrating government records, member network data and information in the public domain.

As the landscape of social enterprise data collection continues to evolve, collaboration and alignment among stakeholders will be essential. By working together to improve data quality and availability, the global community can enhance the understanding of social enterprises and amplify their impact on economies and societies worldwide.



Access the standardized set of survey questions [here](#)

# Introduction

Accurate data on social enterprise enables governments, businesses, investors and industry leaders to make informed decisions, improve policies and drive investment.

Social enterprises represent a diverse and rapidly growing segment of the global economy, driving inclusive and sustainable economic growth. Known by different names – including inclusive business, social business and impact enterprise – these organizations range from small, community-driven initiatives, such as a bakery employing individuals with barriers to employment, to large-scale fintech solutions expanding financial inclusion for millions. Despite their diversity, all social enterprises share a fundamental principle: they prioritize people and the planet over profit.

Recognizing the growing significance of this sector, the Schwab Foundation's Global Alliance for Social Entrepreneurship conducted a comprehensive study in 2024, bringing together available national and global datasets on social enterprises. "The State of Social Enterprise: A Review of Global Data 2013-2023" estimates that there could be as many as 10 million social enterprises worldwide, collectively shaping economies and societies through innovative, purpose-driven solutions.<sup>2</sup>

However, the study also revealed substantial gaps and challenges in the current data landscape, including:

- **Availability and quality of data** – While data on social enterprises exists in over 80 countries, it remains incomplete and inconsistent across regions.

- **Comparability of available data** – Research efforts vary in scope, timing and methodology, making it difficult to draw meaningful comparisons across countries.
- **Quantification of social and environmental value** – Unlike traditional financial metrics, assessing the broader impact of social enterprises remains a complex challenge.

Addressing these data gaps is essential for unlocking the full potential of social enterprises. With more accurate and comparable data, governments, businesses, ecosystem enablers, funders and investors can make more informed decisions to create better policies, foster investment and strengthen the enabling environment for social enterprises. Overcoming these challenges will drive greater social and environmental impact worldwide and support the continued growth of this transformative sector.



# 1

# The challenge

This playbook presents the shared learnings of more than 25 leading organizations collecting data on social enterprise.

## 1.1 The advisory group

In 2024, following the publication of “The State of Social Enterprise”, the Schwab Foundation for Social Entrepreneurship partnered with Social Enterprise UK and Euclid Network to research the variety of methodologies used to collect data on social enterprises.

The team engaged with global experts specializing in social enterprise mapping, survey methodologies and statistical analysis. Additionally, the team hosted the Aligned for Impact workshop, bringing together nearly 50 leaders from Africa, the Americas, Asia and Europe to exchange insights and discuss best practices in data collection.

A key outcome of this initiative was the launch of a dedicated Advisory Group on Social Enterprise Data in December 2024: a group of over 25 active members spanning civil society, academia, the public sector and the private sector. The group serves as a collaborative platform dedicated to enhancing the quality, consistency, comparability and impact of social enterprise data worldwide.

As a starting point, the group has focused on the collection of demographic data about social enterprises through surveys. Surveys have long

been a widely used method for gathering and reporting demographic data on social enterprises globally. Over the past decades, they have played a key role in recurring studies and have become a standard practice among membership organizations and financiers. Given their widespread use, surveys offer significant potential for harmonizing future data collection efforts.

The shared learnings on collecting data through surveys, developed by the Advisory Group on Social Enterprise Data, are presented in this playbook. Designed as a practical guide for practitioners, this playbook provides guidance on collecting, analysing and leveraging demographic data on social enterprises through surveys, ensuring that the sector’s contribution is more accurately measured and effectively communicated on a global scale.

In addition to this playbook, the Advisory Group on Social Enterprise Data has developed a set of common survey questions. These have been published separately on the website of the Global Alliance for Social Entrepreneurship.<sup>3</sup> The members of the advisory group intend to adopt these questions in their own data collection efforts and encourage others to do so as well.

## 1.2 Methodology

The guidance and tools presented in this playbook have been collated using mixed methodologies, including desk research, interviews and mapping of existing surveys.

In-depth reviews of key methodologies were conducted with guidance from leading organizations, including:

- **International Labour Organization (ILO):** Measuring the social and solidarity economy (SSE).<sup>4</sup>
- **UN Inter-Agency Task Force on Social and Solidarity Economy (UNTFSSSE):** Encyclopaedia of the SSE, statistical measurement of the SSE.<sup>5</sup>

- **UN Research Institute for Social Development (UNRISD):** Measuring the scale and impact of the SSE.<sup>6</sup>
- **UN Statistics Division (UNSD):** Satellite account on non-profit and related institutions and volunteer work.<sup>7</sup>
- **Organisation for Economic Co-operation and Development (OECD):** Thirty-four country fact sheets on the SSE.<sup>8</sup>
- **European Commission:** Benchmarking the socio-economic performance of the EU social economy.<sup>9</sup>

Additionally, over 20 global experts were interviewed (see Acknowledgements), who had extensive experience in mapping, surveys and social enterprise research. Their insights further shaped the playbook's recommendations.

The emphasis of the review was on surveys, a widely used tool for mapping social enterprises across countries. Over 30 surveys were analysed, compiling more than 700 questions into a database to identify common themes and assess data comparability. The following surveys, which were either publicly available or confidentially provided to the initiative, were mapped either in their entirety or to the full extent of their relevance for this project.

- **Practitioner surveys**, such as the Global State of Social Enterprise by the British Council<sup>10</sup> and the European Social Enterprise Monitor 2023-2024 by Euclid Network.<sup>11</sup>
- **Academic surveys**, such as the Global Entrepreneurship Monitor 2015 by the Global Entrepreneurship Research Association<sup>12</sup> and the International Comparative Social Enterprise Models 2013-2020 by EMES.<sup>13</sup>
- **Governmental surveys**, such as the 2021 census of social enterprises in Scotland.<sup>14</sup>
- **Verification/certification surveys**, such as by People and Planet First<sup>15</sup> and Buy Social Canada.<sup>16</sup>
- **Membership/grantee surveys**, such as by Ashoka, Catalyst Now, Echoing Green, IKEA Social Entrepreneurship, Impact Hub and Skoll Foundation.

While all inputs focused on social enterprise, definitions and units of analysis varied – some centred on organizations, others on individual social entrepreneurs. A full list of surveys is available in Appendix 1.

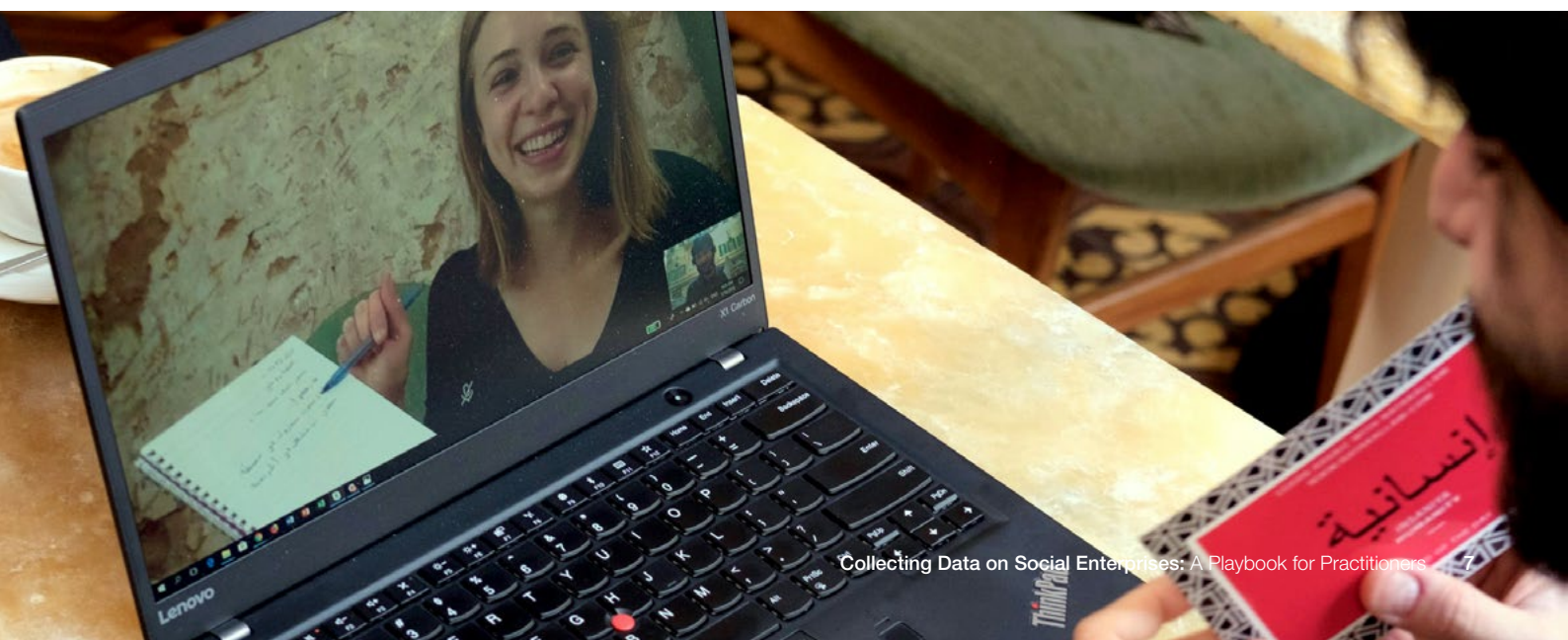
The mapping of existing surveys on social enterprise revealed that while there was often significant divergence in terms of scope, areas of focus and

both the wording and formatting of questions, there were also notable patterns with regard to the themes that were most commonly covered.<sup>17</sup>

The social enterprise data that has been commonly collected can be organized into eight categories, as listed below.<sup>18</sup> These categories are not exhaustive, and most initiatives (both historically and currently) collect data aligned with only some of these categories, in varying combinations and with varying approaches – leading to numerous challenges with data comparability.

- 1. Passport-style data:** Basic details that can be used to identify a social enterprise, including name and registration number (in national business or charity registers).
- 2. Identification and characteristics:** The characteristics that can be used to determine whether an organization may be categorized as a social enterprise according to common definitions.
- 3. Workforce and leadership:** Demographic details on an organization's workforce and founder/leader.
- 4. Social and environmental goals:** The social enterprise's mission and impact focus.
- 5. Economic performance:** Financial performance data, such as turnover, profit and job creation.
- 6. Barriers and challenges:** Challenges experienced by social enterprises.
- 7. Practice and behaviour:** Assessing the way social enterprises go about their business and implement their values.
- 8. General sentiment:** Perceptions of social enterprises, particularly their level of optimism regarding the future of their organizations and the social enterprise sector more broadly.

For a more detailed list of data points collected under each category, see Appendix 2.



This is not to suggest that all surveys asked questions on each of these topics – few if any were so comprehensive and most instead incorporated varying configurations of some of these themes. It is also important to note that even when themes were aligned, the way of asking the question – not only in terms of specific wording, but also with regard to

the question formatting and range of answer options – often differed to varying degrees. While illustrating the diversity of approaches to surveying social enterprises and highlighting potential challenges to data comparability, this exercise simultaneously indicated numerous areas of convergence and thus potential for greater alignment.

## BOX 1 Impact data

It is important to note that while some data collection initiatives investigate a few basic impact metrics – such as the number of beneficiaries supported by a social enterprise – challenges remain in determining whether impact can be accurately and consistently assessed, standardized and thus aggregated

and compared across a territory or sector. In general, when collecting impact data, it is recommended that the team leverage standard frameworks such as the IRIS+ and Impact Management Project (IMP)<sup>19</sup> and/or OECD Development Assistance Committee (DAC) criteria and guidelines.<sup>20</sup>

## 1.3 Purpose and audience

The purpose of this playbook is to provide stakeholders involved in social enterprise data collection with guidance and tools to collect relevant and comparable data on social enterprises.

While the playbook is primarily targeted at practitioners collecting data on social enterprise through surveys, most of its content and recommendations are also relevant for other stakeholders from government, the private sector and academia.

Social enterprise definitions vary widely across contexts, making data collection a complex and adaptable process. Instead of a rigid checklist or step-by-step guide, this playbook provides practical insights drawn from the advisory group's experience in social enterprise data.

The playbook is a live document, to which new elements can and will be added. As the work of the advisory group on social enterprise data continues to expand, the playbook will evolve by incorporating new insights and methodologies.



2

# Collecting data that matters

This playbook provides practitioners and stakeholders with guidance and tools to collect relevant and comparable social enterprise data through surveys.

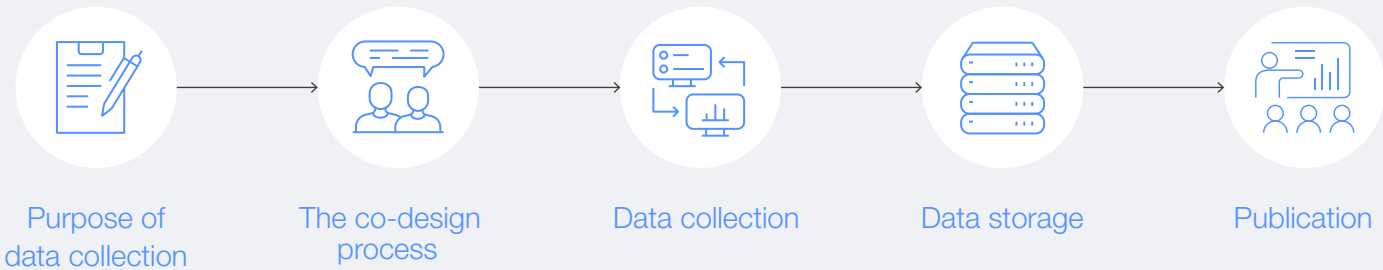
Figure 1 shows the five interlinked steps of data collection on social enterprises, particularly through surveys. Surveys have proved to be a very common means for collecting and reporting demographic data on social enterprises around the world over the past decade and more, and warrant particular focus.

It is important to note that definitions of social enterprise vary by country and context. The term “social enterprise” is also closely linked to other concepts, including “social business,” “social entrepreneurship,” “social innovation,” “the social economy” and “the social and solidarity economy.” Individuals or organizations may identify as more than one of the above, and indeed as something else. Furthermore, some of these concepts may be formally constituted through a legal mechanism in each country. Please see Appendix 3 for an overview of related concepts.

This report does not set out to adopt a particular definition or interpretation of social enterprise or any other term, or to persuade other stakeholders to do so. However, it aims to *identify the characteristics* commonly adopted in surveys and other research and used by national or other membership organizations. By identifying and highlighting characteristics that are important to stakeholders, this playbook can potentially bring greater consistency to research efforts in the future, facilitating greater alignment in data collection and the potential for sharing research and data across partners.

The final two sections of this chapter examine the limitations of using surveys for social enterprise data collection and explore alternative methodologies that have been applied to date.

FIGURE 1. Interlinked steps of data collection through surveys



While definitions and interpretations of social enterprise vary around the world, the definitions used by the members of the Schwab Foundation for Social Entrepreneurship's Advisory Group on Social Enterprise Data share the following characteristics:

- **Purpose:** The organization is primarily driven by a social and/or environmental purpose.
- **Revenue:** A proportion of income is earned through trading.
- **Use of surplus:** The majority of any surplus is reinvested towards its purpose.

The members of the group found that the two additional characteristics used in the State of Social Enterprise report (see below) are important, but cannot be considered as inclusion criteria for research purposes. This

means that if an organization does comply with the three abovementioned criteria but fails to comply with the two below, it is still included in the research.

- **Operations:** They prioritize purpose over profit in operational and strategic decisions.
- **Structure:** They choose legal structures and financing that protect and lock-in purpose for the long term.

The reason being that for operations, the criterion was found to be duplicative with that of "purpose" – if an organization is primarily driven by a social and/or environmental purpose, this purpose will be prioritized in operational and strategic decisions. Structure was not considered as an inclusion criterion because in many countries there are no legal structures available to protect and lock-in purpose for the long term.

## 2.1 Purpose of data collection

The purpose behind collecting data on social enterprises significantly influences the type of data gathered, the scope of the sample and how insights are analysed and used. Clearly defining the motivation for data collection ensures that efforts are targeted and relevant. Examples of motivations that drive data collection include:

- **Demonstrating size and scope:** To build the case and demonstrate social enterprises' contribution and importance in the broader economy and society, increasing the visibility of social enterprises and solidifying their legitimacy as a movement.
- **Identifying barriers and challenges:** To inform policy efforts and funding decisions and to shape a more supportive enabling environment for social enterprises. By gathering data on these obstacles, policy-makers, funders and advocates can better address the needs of social enterprises and work towards removing systemic barriers through increased funding, policy changes or regulatory support, for instance.
- **Strengthening the sector:** Encouraging the sharing of knowledge, best practices and a sense of community among social enterprises; helping build morale, identify best practices and encourage further innovation; and fostering a shared understanding of challenges and opportunities.

The purposes behind gathering data on social enterprises will help uncover the main audiences of the data, which in turn can shape the research and the nature of data gathering, including the framing and questions posed to respondents. These could include:

- **Governments**, which are interested in the economic contribution of social enterprises, including their impact on gross domestic product (GDP) and employment.
- **Businesses**, which are interested in the types of products and services offered by social enterprises, as well as potential partnership opportunities.
- **Finance providers**, which seek insights into the financial health of social enterprises, including funding needs, revenue models and investment potential.

By aligning data collection efforts with the needs of these stakeholders, social enterprises can ensure that their data is relevant, actionable and used effectively to drive meaningful change.

## 2.2 | The co-design process

Once the purpose of data collection and target audiences are defined, the next step is to design the survey. A co-design approach, involving a diverse range of stakeholders, enhances the

survey's relevance, accuracy and impact. The figures below outline the key stakeholders to include in this process.

FIGURE 2 | Key stakeholders in survey design



### Social enterprises

Involving **social enterprises themselves** in the design process ensures that the questions are relevant and understandable. This may be supported through consultation workshops to present and refine the methodology as well as to secure buy-in and support from stakeholders and relevant networks and raise awareness of the research.



### Academia

Engaging experts and **academics** from universities ensures that survey methodologies are grounded in rigorous, reliable science. External reviewers, ideally with no direct involvement in the compilation or analysis of data but closely familiar with the social economy or social enterprise, can help ensure the robustness and applicability of the overall methodology. They can critique findings from the data and help with the interpretation and presentation of the findings, in addition to contributing newer insights.



### Social enterprise supporters

Input from **social enterprise supporters** and infrastructure organizations as well as policy-makers and funders can ensure that the survey captures the data needed to inform decision-making, advocacy and funding priorities. These could include, for instance:

- Government departments, such as the ministries of trade, finance, culture, etc.
- Agencies and quasi-autonomous non-governmental organizations (QUANGOs), for instance charities and societies agencies, co-operative development agencies, agencies for small and medium-sized enterprises (SMEs), as well as the national bank and agencies supporting young people/youth employment.
- Chambers of commerce, federations of small businesses, co-operatives' associations, creative industries' federations, associations of women in business, etc., as well as associations supporting vulnerable groups such as disabled people.
- Funders and financiers, including social or impact investors, big grant-makers and development finance institutions.
- Organizations providing financial and technical support for entrepreneurship development, such as creative and impact hubs, incubators and accelerators.
- Large trading non-profits, credit unions and microfinance representatives.

Surveys are best tested and refined with a small group of social enterprises before wider distribution. This helps identify potential issues, such as excessive time requirements and unclear

questions, and improves language accessibility, ensuring a smoother and more effective data collection process.

FIGURE 3. Good design principles

The experience of surveying social enterprises around the world can offer some guiding principles to aid survey design in future. Some points to bear in mind while designing survey questions include:



A clear understanding of how the questions will derive answers that can contribute to achieving the **overall goals** of the survey, clarity on what those goals are and what the value is to the social enterprise are essential. For instance, if the purpose is to demonstrate the particular role or contribution of social enterprises, or the specific challenges they face, the questions should elicit responses that provide evidence for such perspectives.



**The inclusion or exclusion criteria**, based on the characteristics or practice of respondents, should form part of the survey; for instance, what organizations do with profits or what proportion of their income is generated through commercial activity. This enables filtering and analysis of respondents to focus on those that meet a defined set of social enterprise criteria.



Finding a balance between **close-ended questions** to facilitate analysis and **open-ended responses** that allow respondents to tell their story in their own words, makes it possible to enrich quantitative data with qualitative insights, and to embed the principles of humility, respect, listening and curiosity in the research.



Consideration should be given to wording questions to **allow direct benchmarking** of the responses against other businesses, other countries or previous surveys. This comparative approach allows for findings such as “social enterprises are more likely to x or y than business more widely.”



**Survey length**, if excessive, can exacerbate respondent fatigue, lower response rates and undermine the robustness of the data collected.



**The structure** of the survey – including sections and headings – should guide participants logically through the questions.



**Cultural sensitivities must be respected**, such as by assessing the appropriateness of asking about income, profit or assets, and respecting the sensitive nature of certain demographic data, such as about age, gender or sexual orientation. This extends to considering whether the questions are respectful and relevant to all participants.



**Catering to economic context:** Depending on the environment, questions should be tailored to issues such as informality, widespread use of mobile phones for surveys and financial literacy.



Prioritizing **clarity and simplicity of language**, avoiding jargon or overly technical language, and respecting and adapting to the local context are important. This includes double-checking translations of survey questions in appropriate local languages.

Furthermore, when leaning on the experience of previous surveys, before adapting a survey question from a previous version or one used elsewhere, it is important to understand why the original methodology was designed and what would be lost if questions are omitted or altered.

## 2.3 Data collection

After the survey is designed and tested, a range of methods and tools can be used to collect the data. Common survey methods include the use of:

- **Online survey tools:** Platforms such as SurveyMonkey, SurveyGizmo and Qualtrics are widely used, and increasingly sector-specific platforms such as Good Market are being adopted.
- **Telephone surveys:** These use a structured script and allow for voice-note submissions.
- **Face-to-face surveys:** These comprise in-person interviews using a printed survey script.

When communicating the survey, it may be helpful to use terms like “social enterprise” or relevant local variations. However, inclusive language – such as “businesses working to support people and the planet” or “organizations improving their community” – can help reach those who may not self-identify as social enterprises.

Effective outreach methods include:

- **Direct outreach:** Contact social enterprises via email or phone using existing databases.
- **In-person visits:** Engage social enterprises, support organizations and co-working spaces. Ensure outreach covers a broad geographic area, not just capital cities.
- **Partner networks:** Request social enterprise support organizations to distribute the survey to their members, grantees and beneficiaries.
- **Social media and local media:** Leverage the channels of researchers, partners and stakeholders.
- **Events and drop-in sessions:** Host targeted events with engaging speakers and encourage attendees to complete the survey during registration or breaks.
- **Marketing materials:** Utilize promotional videos, QR codes and other engagement tools.
- **Industry events:** Attend relevant social enterprise events hosted by other organizations to reach a wider audience.

### BOX 3 Non-extractive sampling – Providing benefits to your respondents

To help counter survey fatigue and to balance the potentially extractive nature of surveys, research teams may consider the use of incentives for survey completion, which may include:

- Marketing and communicating the value of the evidence gathered.
- The prospect of social enterprise certification.
- Voting rights, e.g. for membership bodies.
- Benchmarked feedback that creates value for respondents.
- Convenings and special benefits for participants at these events (access, recognition, special catering, etc.).
- Opportunities to raise the respondent’s profile at events with “meet the funder” or “meet the buyer” sessions, opportunities to network or

display space to showcase products and services.

- Under certain circumstances, cash incentives and prizes.
- Relevant and targeted tools, learning opportunities and supports (e.g. directing respondents to toolkits, trainings or support organizations when they indicate interest in, for instance, learning more about or accessing support on financing options or impact measurement).

When choosing incentive mechanisms, it is important to consider the potential impact of the incentive on individual responses and data validity. In extreme cases, incentives might lead to fake submissions as respondents are solely interested in receiving the incentive – especially in the case of cash and prizes.

## 2.4 Data storage

Effective data storage is essential to maintaining confidentiality, ensuring ethical data use and safeguarding survey respondents. Research teams must establish clear policies and procedures to protect collected data while allowing for meaningful analysis.

Key considerations include:

- **Data use and confidentiality:** Collected data must only be used for purposes agreed upon by respondents. It should not be shared with third parties or used for marketing unless explicit consent has been obtained.
- **Access and aggregation:** Raw data should remain accessible only to the research team. Findings should not be published in an aggregated form unless respondents have consented to their data being shared.
- **Consent and safeguarding:** All survey participants must provide formal consent, either

in writing or verbally, before their data is used. They should be fully informed about how their information will be utilized at every stage of the research process.

Additionally, research teams should implement a basic safeguarding policy to address any issues related to participant or team safety.

When developing data-sharing practices, resources such as the European Union (EU) Code of Conduct for Data Sharing in the Social Economy<sup>21</sup> can provide valuable guidance. This code, co-created by stakeholders in the European social economy, offers best practices, ethical guidelines and templates for transparent data usage. While some elements may need to be adapted for different contexts, its core principles remain widely applicable.

By adhering to these best practices, research teams can ensure responsible data management while building trust with participants and stakeholders.

## 2.5 Data presentation and publication

Effectively presenting research findings ensures that insights are accessible and actionable. Data collected on social enterprises can be shared in various formats tailored to different audiences, from policy-makers and academics to social enterprises themselves.

Key methods of data presentation include:

- **Reports:** Comprehensive documents, such as country-specific reports (e.g. “The State of Social Enterprise in Ghana”)<sup>22</sup> or network reports, providing in-depth analysis and context.
- **Summary infographics:** Visual summaries distilling key findings into digestible formats suitable for social media, presentations and quick reference.
- **Interactive data visualizations:** Tools that allow users to explore the data independently, cross-reference variables and analyse trends in a dynamic way.

- **Academic collaboration:** Partnering with academic institutions to facilitate further research through controlled data-sharing agreements.
- **Open-source data:** Making anonymized, aggregated datasets available for public download (in .xls or .csv format) to encourage broader analysis and innovation.
- **Respondent feedback:** Providing participating social enterprises with tailored, benchmarked insights, fostering a reciprocal learning experience where they can compare their performance with peers’.

By utilizing a mix of these approaches, research findings can reach a broad audience and contribute to a deeper understanding of the social enterprise sector.

## 2.6 Potential limitations and flaws

When leveraging surveys to collect data on social enterprise, it is important to be aware of the limitations and flaws of this method. Surveys conducted with social enterprises often present a range of significant issues, limitations and flaws with regard to the methods and approaches used in their design and execution. These may include:

- The **extractive** nature of many surveys, where privileged, external institutions and researchers impose top-down terminology and frameworks that may not align with the realities or lived experiences of social enterprises. Surveys may not resonate with the true experiences of respondents or accurately capture the diversity of perspectives within the sector. Ultimately, the respondents may not feel that they are adequately compensated or rewarded for their participation in the research.
- Surveys demand **time and resources** from both researchers and respondents. Social enterprises may be small and fragile, and the burden of filling out surveys could be time-consuming and distracting, though it may on occasion also be helpful in promoting important self-reflection.
- The frequency of surveys can contribute to **respondent fatigue** and reluctance to participate. Some social enterprises report feeling “over-researched but under-resourced,” leading to a growing sense of frustration and disengagement among potential respondents. However, in some cases, “answering surveys led by national statistical offices is mandatory. The response rate should therefore be much better than for the ones led by a research institute or consultant.”<sup>23</sup>
- There can be concerns about **data privacy and security**, as some respondents may worry that the government or tax authorities may use the information collected for monitoring or compliance purposes. Issues like the collection of GPS data or other sensitive information may make participants hesitant to share their experiences, fearing potential risks or repercussions.
- The **accuracy and reliability of survey data** is often in question. In many cases, surveys suffer from methodological flaws, such as small sample sizes, which undermine the usefulness of their results. Indeed, representative sampling is practically impossible when the size and shape of the overall population is, to some extent, unknown or even unknowable. There remain “methodological challenges regarding sampling (namely in the absence of a clearly enumerated population).”<sup>24</sup> This is particularly problematic when using cross-tabulation, which can skew findings if the sample size is too limited.
- **Self-selection bias** is a common issue, as surveys are often more accessible to those who are tech-literate, digitally confident, well-connected, English-speaking, urban and educated. This results in unrepresentative samples that fail to capture the diversity of social enterprises, particularly those in rural areas or those led by under-represented groups. Other types of bias can also play a significant distorting role in surveys.
- Surveys can also struggle with **accurately capturing complex or ambiguous data**. For example, questions about job numbers within social enterprises are often difficult to answer precisely, as the nature of work in these organizations can be fluid and diverse. Respondents may also misreport or offer estimates.
- In presenting survey results, researchers and those communicating with them externally can **misrepresent or manipulate findings**. For instance, claiming that social enterprises are more often led by women can overlook important sectoral differences, such as the prevalence of women-led enterprises in certain sectors and not others, providing potentially misleading conclusions about gender leadership in the movement.



## 2.7 Other data gathering methodologies

While surveys are a widely used tool for gathering insights, a range of other data collection methods have been employed to create an understanding of social enterprises. These alternative approaches can help address limitations of surveys, such as response biases or difficulties in reaching certain segments of the sector. These alternative sources of data are described below, along with their limitations.

### Regulatory and registry data

These approaches include, at the highest level of formality, the collation of registry data and official statistics by governments. Some examples include:

- Several governments have implemented **national registers for social enterprise**, generally associated with a legal status developed to certify social enterprises, as in Austria,<sup>25</sup> Denmark<sup>26</sup> and Latvia;<sup>27</sup> and in legal form in the United Kingdom (where some social enterprise data is held by the Community Interest Company regulator).<sup>28</sup> Similarly, South Korea collects sectoral data through a dedicated support institution established through the Ministry of Employment and Labour, the Social Enterprise Promotion Agency.<sup>29</sup>
- Where social enterprise registries do not exist, similar organizational data is often held instead with a government's **business or charity registry**, and may or may not be identifiable from within that wider dataset.
- Official statistics are also developed by governments through **national accounts**, though these generally focus more broadly on the social (and solidarity) economy, as in Ecuador,<sup>30</sup> Spain<sup>31</sup> and Quebec.<sup>32</sup>

While regulatory data, as a government source, tends to bring a high level of rigour and accuracy (for instance, potentially including accurate and up-to-date records of income taken from official taxation records), in other ways it can be quite limited. As very few regulatory bodies exist that collect specific data on social enterprise, this necessitates identifying social enterprises within business or charity registers that possibly collect varying types of data even within a single country. Similarly, governments may take different approaches to the types and formats of data they gather, and even basic details such as legal forms, given their national specificity, can impede aggregation and comparability across contexts.

Beyond the challenge of inconsistency, regulatory data, crucially, excludes those working in the informal economy, which is a significant problem in contexts where the informal economy constitutes a majority of the broader economy. Furthermore, regulatory data is often inaccessible to external stakeholders and researchers without the permission and co-operation of the relevant and responsible government bodies.

### Satellite accounts

Considerable work has been undertaken on the development of satellite accounts for the social economy – by UN agencies, for instance – as they promise extensive data across entire territories. However, beyond a few countries – Portugal,<sup>33</sup> Ecuador, Poland and Mexico – they are nearly non-existent and largely focus on the broader social (and solidarity) economy rather than on social enterprises specifically. Beyond the challenges of facilitating alignment in satellite account data across countries and filtering out social enterprises from the broader sample, the creation of satellite accounts can be a slow and onerous process given that it requires impetus and funding from governments.



## Extrapolations and modelling

While surveys can provide a *flavour* of the social enterprise community, they are not an instrument for establishing the *scale* of the social enterprise population in any given context.

Where there has been a paucity of data, some studies have also utilized modelling or extrapolation methods to integrate the limited existing data into predictive models that can provide broader estimates. For instance, Siemens Stiftung published a study that drew on proxy data regarding the number of small and medium-sized enterprises and the rates of employment growth in various African countries to estimate prevalence rates and job creation potential among social enterprises.<sup>34</sup> While such approaches necessitate close methodological scrutiny and can at best provide rough estimates, limitations on data availability mean that in some contexts modelling and extrapolation are the only possible options until new data collection initiatives are undertaken.

Based on the combination of uncertainties in these calculations, it is important to note that these figures can only ever be viewed as rough estimates. However, they have often subsequently been used in communications, by politicians or advocates of social enterprise, and develop a life of their own – beyond the original researchers' caveats. At times, these estimates and extrapolations have been scientifically questionable but have gained significant currency.

## Artificial intelligence and scraping

While still a nascent approach, artificial intelligence (AI) and data scraping have also been used to extract and analyse data from the internet or other broad and potentially disparate sources. For example, Impact Intelligence utilized AI to analyse the story-form text of applications for a Bayer Foundation award on women's empowerment in order to identify and analyse key challenges faced by female entrepreneurs in sub-Saharan Africa.<sup>35</sup>

## Membership, networks, funders and financiers

Membership and other support organizations often hold a significant amount of data, as many of these organizations have been operating in the sector for many years and have developed extensive networks. In addition, given the motivation of (potential) members to provide complete, accurate data in order to pass application screenings or to

participate in various support programmes, they may have developed levels of trust and mutual understanding with members that enable them to achieve higher response rates with their surveys than academics or consultancies. Organizations collecting such data include the Aspen Network of Development Entrepreneurs, Ashoka, Catalyst Now, Echoing Green, IKEA Social Entrepreneurship, Impact Hub, the Schwab Foundation, Skoll Foundation and Yunus Social Business.

However, data collected by some member networks often focuses on individual founders/entrepreneurs and therefore is not quite as extensive with regard to organizational details. In addition, membership of some of the most high-profile global networks may be skewed towards particular types of entrepreneurs/enterprises (i.e. high-growth oriented, more elite, technologically-savvy, highly-educated and well-connected) rather than being representative of the broader population of social enterprises. When comparing data across membership organizations, there is also a significant possibility of double-counting as certain individuals may be members or grantees of several organizations.

## Certification schemes

Another source of data collected by membership organizations pertains to social enterprise certification – essentially the non-governmental equivalent of social enterprises' legal status – and associated registries. These organizations collect and often periodically verify (the sometimes extensive) data to assess social enterprise status against various sets of criteria. Notable examples include the People and Planet First verification,<sup>36</sup> which is facilitated through the Good Market digital commons.

While various interlinkages exist between different certification and verification schemes (for instance, the People and Planet First verification is linked with Buy Social certification and Fair Trade Federation membership), they also vary widely in terms of the scope and specifics of the data they collect. Given that each certification is based on a set of core criteria specific to that particular verification scheme, the extent to which data alignment and comparability can be achieved through the basic certification surveys tends to be quite limited.

Nevertheless, an important advantage of such schemes is that they often focus on specific practices instituted by social enterprises (often an area lacking in other surveys) and generally require applicants to provide concrete evidence to verify their claims, thus ensuring a greater degree of data accuracy than can be achieved through claims self-reported in surveys.

## Interviews and desk research

Some country studies, especially in the EU, have relied on expert researchers and literature reviews to bring together country snapshots and studies. However, while these can be instructive and provide overviews that may not have existed before, they can rely on the subjective perspectives of a handful of individuals and do not, as such, generate new, primary data.

## Mixed methods

It is important to note that while surveys are perhaps the most common data collection method utilized in country studies, these studies often adopt mixed-methods approaches and supplement surveys with interviews and focus groups. It is also important to note that many of these studies involve collaboration between different (types of) actors, and often vary in scope,

sampling method, level of representativeness and time period (among other factors).

In several cases, notably Scotland and the Republic of Ireland, censuses have been implemented with a particular focus on social enterprise. The Scottish census, for example, draws on a database of social enterprises that was developed based on data from several different regulatory bodies and screened against the Voluntary Code of Practice for Social Enterprise in Scotland.<sup>37</sup> Financial data from these charity and company regulators was then combined with data collected through a survey of these organizations, together forming the basis of the census analyses.

Similarly, in 2024, Social Traders in Australia published the 2024 “Report on Identified Social Enterprises”.<sup>38</sup> This combined data from Social Traders-certified social enterprises alongside Australian Charities and Not-for-profits Commission data, and data from the Victorian government.



# Conclusion

Harmonizing, exchanging or even integrating data collection can significantly enhance outcomes for social enterprises and the communities they support.

Collecting data through surveys is a crucial step in understanding the social enterprise landscape, shaping policy and informing investment and support strategies. However, as highlighted throughout this playbook, surveys alone cannot fully capture the complexity and diversity of social enterprises worldwide. The work of the Advisory Group on Social Enterprise Data has provided valuable insights into current methodologies, their limitations and the gaps that remain. Looking ahead, there is an opportunity to create a more comprehensive, interconnected and sustainable data system that enhances the availability and accuracy of social enterprise data globally. To this end, the advisory group issues several recommendations:

- **Enhancing engagement and participation:** To encourage wider participation, the data collection process should provide tangible value to respondents. This could include benchmarking feedback, certification incentives or integration with initiatives such as People and Planet First. A user-friendly platform where social enterprises can update and manage their own data could improve accuracy and long-term engagement. At the same time, partnerships with national and sub-national networks would ensure that social enterprises are connected to data initiatives that align with their geographical and thematic priorities.
- **Strengthening governance and global oversight:** A truly global approach to social enterprise data collection requires inclusive governance with representation from all regions, particularly under-represented areas such as the Middle East and South America. A Global Social Enterprise Observatory could serve as a neutral, multistakeholder entity, ensuring that data is collectively owned by the global community rather than any single government, university or organization. This would align the interests of social enterprises, national networks, governments, funders and researchers, fostering collaboration and shared ownership of data resources.
- **Ensuring transparency and accessibility:** A more open and equitable approach to data sharing could be achieved through open-source resources that distinguish between public and

private data while maintaining strict privacy protections. Adherence to frameworks such as the EU's General Data Protection Regulation (GDPR) would be essential, particularly in relation to crowdsourced monitoring and anonymity safeguards. Transparent processes for data collection, analysis and reporting would build trust and enhance the credibility of social enterprise data worldwide.

- **Data inputs:** An integrated data platform or sector-wide protocols for data exchange could reduce the burden on social enterprises by integrating multiple data sources, including survey insights, network data, government records and public domain information. This would allow for a more seamless and interoperable approach, minimizing redundancy and ensuring more holistic data collection. While technological advancements, such as AI, may facilitate data integration, practical challenges remain, particularly in regions with high informality and limited digital access.
- **Sustaining the initiative through funding and investment:** For such a data system to be viable in the long term, a sustainable financial model must be developed. Global networks, investors and institutions could play a pivotal role in funding and supporting this initiative. A mix of public, private and philanthropic funding sources would ensure that research continues, particularly in countries where data on social enterprise remains scarce.

Ultimately, sector-wide harmonization, exchange and even integration of data collection has the potential to enable significant improvements for social enterprises and the communities they serve. Such an initiative may provide more accurate, real-time and representative data that can inform government policies, create better visibility for social enterprises, create efficiencies for deal sourcing among investors and support overall sector development through insights, benchmarks and standardization.

By addressing existing gaps in equitable ways and adopting a more collaborative, technology-driven and inclusive approach, the global social enterprise community can work towards a future where data contributes to meaningful change.

# Appendix 1: List of surveys

The following surveys, which were either publicly available or confidentially provided to the research team, were mapped either in their entirety or to the full extent of their relevance for this project.

## Practitioner

- Collaborative Mapping of Social Enterprises in Argentina 2021 by Mesa IES (EKHOS, Universidad Austral, Keidos, Libertate, Efecto Colibrí, Universidad de San Andrés).
- European Social Enterprise Monitor 2023-2024 by Euclid Network.
- Finding Australia's Social Enterprise Sector 2016 by Social Traders and Centre for Social Impact Swinburne.
- Global State of Social Enterprise by the British Council.
- Map for Impact 2017 by the Centre for Social Impact Swinburne.
- Radiography of the State of Social Enterprise in Colombia 2023 by RECON.
- Social Enterprise Sector Survey 2015 by Simon Fraser University and Mount Royal University.
- Social Entrepreneurship for Inclusive Growth in the Democratic Republic of Congo 2020 by the World Bank.
- State of Social Enterprise 2023 by Social Enterprise UK.

## Academic

- Global Entrepreneurship Monitor 2015 by the Global Entrepreneurship Research Association.
- International Comparative Social Enterprise Models 2013-2020 by EMES Research Network for Social Enterprise.

## Governmental

- Social Enterprise in Scotland – 2021 Census by CEIS, Scottish government and Social Value Lab.
- Social Enterprises in Ireland: A Baseline Data Collection Exercise by Amárach Research, Social Enterprise Republic of Ireland and the

Irish Local Development Network, for the Department of Rural and Community Development.

## Certification/verification

- People and Planet First verification.
- Buy Social Canada Social Enterprise Certification.

## Membership organization/ grantee

- Ashoka – Global Fellows Survey 2021.
- Aspen Network of Development Entrepreneurs – Global Accelerator Learning Initiative (GALI) Venture Survey.
- Catalyst Now – membership application and 2024 Member Impact Questionnaire.
- Echoing Green – fellowship application, fellowship baseline/midpoint/capstone evaluations and Global Fellows Survey 2021.
- IKEA Social Entrepreneurship – 2021 Beneficiary Reporting.
- Impact Hub – Global Community Survey 2024.
- Schwab Foundation – Portfolio Progress Survey 2024.
- Skoll Foundation – Annual Community Survey 2024.

The database was further supplemented with the addition of question *themes* extracted from publications where the full survey instrument associated with the study was neither publicly available nor accessible to the research team. The following studies were integrated in this manner:

- 2019 Census of Social Enterprises in Mexico by Disruptivo.
- Business for Good: Maximizing the Value of Social Enterprises in Asia 2019 by Centre for Asian Philanthropy and Society.

- China Social Enterprise Survey 2019 by China Social Enterprise and Impact Investment Forum and the Narada Foundation.
- Korea Social Economy Report 2021 by Korean Social Enterprise Promotion Agency.
- Social Entrepreneurship Barometer 2023 by Convergences.
- Structure and Dynamics of Social Entrepreneurship in Chile 2016 by Universidad de Desarrollo, University of Leeds and University of Newcastle.
- The Number and Characteristics of Social Enterprises in New Zealand 2018 by Business and Economics Research, for Statistics New Zealand.
- Good Market digital commons application.



# Appendix 2: List of common survey themes

The type of data available on social enterprise varies significantly, as a result of diverse research objectives, time periods, geographical contexts and more. Data may be qualitative or quantitative, or a mix of both. But a number of common themes can be identified. Delineated by the categorization of basic types of data outlined on page 7, the common themes that emerged from the survey mapping for this paper are as follows.

## 1. Identification and characteristics

- (Self) identification as a social enterprise (or with an alternative label more common in a particular context).
- Purpose (namely, whether or not they pursue/prioritize a social/environmental purpose).
- Legal form.
- Age of the social enterprise (when it was legally founded and/or when it began operations).
- Geography and scale (where the organization was based, operated, made sales or created impact).
- Business sector/industry.
- Business model (i.e. whether the organization sold goods or provided services, and sometimes the specific goods/services created).
- Types of income.
- Proportion of income derived from trading.
- Profit distribution (where profits were distributed, and in what proportions or amounts).

## 2. Workforce and leadership

- Workforce breakdown (sometimes by organizational level, often with a particular focus on the leader/founder).
  - Age.
  - Gender.
  - Under-represented backgrounds (most often with regard to disability or ethnic identity).

## 3. Social and environmental mission

- Impact model: Aim and approach (what impact the social enterprise sought to create (often through alignment with particular UN

Sustainable Development Goals (SDGs) and how they aimed to do so).

- Beneficiary type.
- Number of beneficiaries.
- Impact measurement practices (whether or not social enterprises engaged in this practice and the approach they utilized).

## 4. Economic performance

- Number of employees (and often volunteers).
- Types and amounts of annual turnover/income/revenue (sometimes disaggregated by source).
- Expenditures (amount and type).
- Types of financing (and sometimes investment amounts).
- Profitability (whether or not the organization was profitable, and sometimes the amount of profit made).
- Growth and scaling (past and predicted, both in terms of turnover and job creation).

## 5. Barriers and challenges/general sentiment

- Common barriers (and sometimes their prioritization or the extent to which they are problematic).
- Financing challenges.
- Support needs.
- Network/ecosystem engagement (extent of engagement with a network, and specific sources of support previously accessed and currently needed).

## 6. Practice and behaviour

- Environmental sustainability (usually focused on energy usage).
- Innovation.
- Pay equity (living wage and pay ratios).
- Governance:
  - Stakeholder participation.
  - Ownership.

# Appendix 3: List of definitions

Definitions of social enterprise vary among countries and according to context. The term “social enterprise” is also closely linked to other concepts, including “social business”, “social entrepreneurship”, “social innovation”, “the social economy” and “the social and solidarity economy”. Individuals or organizations may identify as more than one of the above, and indeed as something else. Furthermore, some of these concepts may be formally constituted through a legal mechanism in a given country. The list below presents the most common definitions of social enterprise and related concepts.

## Social enterprise

While definitions and interpretations of social enterprise vary around the world, the common characteristics among the definitions used by members of the Advisory Group on Social Enterprise Data are:

- **Purpose:** The organization is primarily driven by a social and/or environmental purpose.
- **Revenue:** A proportion of income is earned through trading.
- **Use of surplus:** The majority of surplus, if any, is reinvested towards its purpose.

The 2022 Social Economy Action Plan of the European Commission defines social enterprise as follows: “Social enterprises operate by providing goods and services for the market in an entrepreneurial and often innovative fashion, having social and/or environmental objectives as the reason for their commercial activity. Profits are mainly reinvested with a view to achieving their societal objective. Their method of organization and ownership also follow democratic or participatory principles or focus on social progress. Social enterprises adopt a variety of legal forms depending on the national context.”<sup>39</sup>

## Social business

The term “social business” was first introduced by Nobel laureate Muhammad Yunus, who defined it as “a non-loss, non-dividend company dedicated entirely to achieve a social goal.”<sup>40</sup> In the 2011 Social Business Initiative of the European Commission, social business was defined as “an enterprise whose primary objective is to achieve social impact rather than generating profit for its owners or stakeholders.”<sup>41</sup>

## Social entrepreneurship

While the terms “social enterprise” or “social business” are often used to describe an established organization, social entrepreneurship refers to the process of an individual using entrepreneurial activities to address a societal problem. Founders of social enterprises are often referred to as social entrepreneurs. In a 2023 OECD publication that reviews the concepts related to the social and solidarity economy, social entrepreneurship is described as follows: “Individuals and organizations that engage in social entrepreneurship leverage entrepreneurial activities to develop innovative ways to address pressing social challenges, benefit the common good, support labour market integration and contribute to sustainable and inclusive transition. Consequently, social entrepreneurship does not reflect a specific type of enterprise but rather a wide spectrum of entities ranging from profit-oriented businesses that engage in social activities such as corporate philanthropy, hybrid businesses that mix profit motivations and social objectives, non-profit organizations, and even ventures led by the public sector”.<sup>42</sup>

## Social innovation

Social innovation is mostly understood as a process of developing and implementing effective ideas, strategies and solutions to address societal challenges. It is not necessarily linked to an individual or organization. It arises from social enterprise and civil society as well as from other fields such as the public sector or the conventional private sector. The OECD defines social innovation as: “the design and implementation of new solutions that imply conceptual, process, product, or organizational change, which ultimately aim to improve the welfare and wellbeing of individuals and communities”.<sup>43</sup>

## Social economy

Social economy is used to describe a wide range of organizations that adhere to the principles of prioritizing social objectives over profit. These typically include cooperatives, mutual societies, non-profit organizations and social enterprises. In the World Economic Forum report on unlocking the social economy, the social economy is defined as follows: “The social economy comprises multiple models with a common ambition to create a more inclusive and sustainable economic paradigm. It is composed of a highly heterogeneous set of private

actors, including associations, co-operatives, foundations, not-for-profit organizations, voluntary groups and social enterprises”.<sup>44</sup>

## Social and solidarity economy

The term “social and solidarity economy” has developed to include organizations with an economic vision based on solidarity and social inclusion, and often encompasses informal, locally rooted initiatives. The OECD states that: “While the social economy is understood to be composed of established entities, the solidarity economy can also include more spontaneous community-based initiatives that take place at the grassroots level”.<sup>45</sup>

The 2023 United Nations resolution on promoting the social and solidarity economy (SSE) for sustainable development adopted the following definition: “The social and solidarity economy encompasses enterprises, organizations and other entities that are engaged in economic, social and environmental activities to serve the collective and/or general interest, which are based on the principles of voluntary cooperation and mutual aid, democratic and/or participatory governance, autonomy and independence and the primacy of people and social purpose over capital in the distribution and use of surpluses and/or profits,

as well as assets, that social and solidarity economy entities aspire to long-term viability and sustainability and to the transition from the informal to the formal economy and operate in all sectors of the economy, that they put into practice a set of values which are intrinsic to their functioning and consistent with care for people and planet, equality and fairness, interdependence, self-governance, transparency and accountability and the attainment of decent work and livelihoods and that, according to national circumstances, the social and solidarity economy includes cooperatives, associations, mutual societies, foundations, social enterprises, self-help groups and other entities operating in accordance with the values and principles of the social and solidarity economy”.<sup>46</sup>

## Other terms

Other relevant and related terms include “inclusive business”, “impact enterprise”, “mission-led business”, “purpose-led business”, “the collaborative economy”, “the new economy”, “the popular economy” and “the economy for the common good”. There are also links here to the emergent field of social investment/impact investment, but these are focused on the supply side of investment flows rather than the demand side of the recipient enterprises.



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