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**e-Training Centre for
Social Entrepreneurs**

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e-Training Centre for SE

Intellectual Output 1 - ETC.4SE Platform IO1 Global Report



SPI
April 2018





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Introduction

“ETC.4SE – eTraining Centre for Social Entrepreneurs” is a two-year (2017 - 2019) European project which aims to develop an online training centre in which adults can find support in setting up their own social enterprise.

In order to define the e-Training Centre’s contents and understand the relevant training needs, the project consortium investigated the skills and competences of adults in the partner countries (Greece, United Kingdom, Portugal and the Netherlands).

The process of data collection was carried through:

1. An online survey (questionnaire) addressed to future entrepreneurs, experienced entrepreneurs, adult educators’ providers, experts and other stakeholders in order to determine the skills and competences required to become an entrepreneur. The objective was to identify the key elements to be addressed in the ETC.4SE Curriculum and Toolbox for the successful development of social entrepreneurship projects through open digital tools. The questionnaire allowed to understand the training needs of future entrepreneurs. The consortium collected 101 responses in total (all countries).
2. A desk research in each country which lists general information about the country, identifies existing good practices of adult training and/or other initiative in providing training on Entrepreneurial and Start-ups user-centre innovation skills and of successful social entrepreneurship projects with emphasis on training, skills and competences. National reports are an integral part of the phase of desk research and will provide useful information for the preparation of IO 1 – ETC.4SE Platform.

This document intends to be a compilation of the information collected by all partners in the national reports in order to have an overview of the state of art of social entrepreneurship in the participating countries. Based on this information the consortium will now define the training curriculum, the contents and the digital tools to be developed for the online training course.



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Methodology

ETC4SE consortium developed two activities to collect data for this report: the desk research and the questionnaires.

The desk research was carried out by each partner that collected general information about the country and identified existing good practices of entrepreneurial training skills and of successful social entrepreneurship projects with emphasis on training, skills and competences.

For the national reports, SPI has outlined a research guideline for the collection of necessary information, and prepared other 2 documents: a case study common structure and the description of the target group profile. These documents were shared with all partners for analysis and feedback. SPI has also developed a set of questions to prepare the online questionnaire. After a careful consideration of the documents by the partnership, a Skype meeting was held to discuss the relevant aspects for the next steps. Then, all partners started to collect the available information and prepared a national report.

The Survey Monkey online platform was used for launching and disseminating the ETC4SE questionnaire. This tool is free and allows data analysis with graphic representation. Each partner disseminated the questionnaire to the target group with the aim of collecting 20 responses in their country. This online survey was addressed to future entrepreneurs, experienced entrepreneurs, adult educators' providers, experts and other stakeholders in order to determine the skills and competences required to become an entrepreneur. In total, 101 responses were collect.

As a final task within the IO1, SPI prepared a Global Report compiling the information collected in the national reports in order to have an overview of the state of art of social entrepreneurship in the participating countries. Based on this information the consortium will work on the development of the training curriculum, the training contents and the digital tools.



Planned activities for IO1

Activity	Duration	Result/Output
Task 1: Needs analysis to understand the main challenges users face when dealing with entrepreneurship.	December 2017 – April 2018	<ul style="list-style-type: none"> ✓ Desk research – National reports/Global report ✓ Design and dissemination of the questionnaire to the target group

Table 1

Desk research Results

Greece

General information about the country (macroeconomics data):

- Population: 10.816.286 (men: 5.303.223 women: 5.513.063)
- Population in the Capital Region of Attica: 3.828.434 (Municipality of Athens: 664.046)

Since 2009, the Greek economy faces significant problems, including rising unemployment levels. By the end of 2009, as a result of the combination of the international economic crisis and internal factors, the Greek economy faced its most serious crisis since 1993, with the highest government deficit, and the second highest debt as a percentage of Gross Domestic Product (GDP) in the European Union (EU). The 2009 government deficit reached 15.4% of GDP. This, and rising debt levels (to 127.1% of GDP in 2009) led to high borrowing costs, which caused a severe financial crisis.

- Employment rate (2016): 39, 9%
- Unemployment rate (2016): 23, 5%. Individuals aged 15-29 = 38, 4%
- Employees: 65, 9%
- Self-employed: 22, 8%
- Employers: 7, 4%



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According to the data of the Hellenic Statistical Authority, the per capita GDP of 2015 has fallen to € 16,181, from € 16,336 in 2014, € 16,475 in 2013, € 17,311 in 2012, € 18,643 in 2011, € 20,324 in 2010, € 21,386 in 2009 and € 21,845 in 2008, the highest per capita GDP per capita. Compared to 2008, the per capita GDP of 2015 is reduced by 26%. The decline in GDP per capita began in 2009 and has accelerated since 2010 with the tough restrictive measures of the memorandums, which have reduced wages, pensions, business profits and increased income and capital taxation and the dramatic contraction of productive and investment activity in the same period that the recession has brought. Developments in GDP per head follow developments in GDP, which declined by 27.4% or € 66.3 billion from 2008 to 2015, with the year-on-year decrease being recorded for the year 2011, when it declined by 19 billion €, while a record recession was recorded by 9.1%. It is worth noting that GDP fell by € 2.7 billion in 2014, despite a real GDP change of 0.7%, due to the effect of deflation.

General information on the state of art of social entrepreneurship initiatives

Social economy and social innovation are relatively new concepts in Greece and are mainly associated to what is known as 'Solidarity Economy'. While in other European countries discussions related to social innovation have taken place for almost 30 years now, in Greece organised forms of social ventures apparent for about 10 years, even though in an experimental stage. The fact that led at the social innovation became a necessity, was especially due to the economic crisis that heavily hit Greece.

In September 2011, for the first time in Greece, a law for Social Economy and Social Entrepreneurship was adopted by the Greek parliament and the distinct legal form of Co-operative Social Enterprises (Koin.S.Ep.s) was created. The first definition in Greece for "Social Cooperative Enterprise" (SCE) appears in this Law (4019/2011) on "Social Economy and Social Entrepreneurship". Art. 2 § 1 provides for the introduction of this new form of social cooperative: "The Social Cooperative Enterprise is established as an entity of Social Economy. It is a civil cooperative with a social cause possessing entrepreneurial capacity by law. The Social Cooperative Enterprise members can be either individuals or legal entities. Its members participate with one vote, regardless of the cooperative shares they possess".

The latest Greek law 4430/2016 extends the term of social economy enterprises including: a) The Social Cooperative Enterprises, b) Social Cooperatives Limited Liability, governed by Article 12 of Law 2716/1999, c) Workers Cooperatives, d) any other legal person if it has acquired legal personality, such as in particular agricultural cooperatives, civil cooperatives, civil



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services, under the condition that they develop collective and socially beneficial activities, as defined in Art. 2 § 2 and 3.

Up in January 2015 over 700 Social Cooperative Enterprises have been established¹. Newer data indicate that up to July 2016, 856 Social Cooperative Enterprises were registered in the Social Economy Registry. However, not all registered enterprises are actually operational (it is estimated that only 30 to 50 per cent of the registered Koin.S.Ep.s are actually operating)². It is noteworthy that only 4% of them are Social Cooperative Enterprises for Integration³.

Active Social and Solidarity Economy (SSE) entities operating in the various branches of the economy are of a very small size and the range of services and products that each of them varies according to its purpose, as defined by its members in its statutes. The sectors with the largest share are education (12.77%), catering (10.64%), organizational activities (9.22%), wholesale (7.45%) and retail trade (6.38%)⁴.

The largest number of employees is employed in cleaning services (7.4%), education (5.1%) and creative activities (4.6%), followed by catering (3.7%), administrative activities (3.4%) and the activities of organizations (3.0%). In the remaining sectors, the number of employees is much lower. The highest turnover is accounted for by the cleaning services sector (€ 53,483), followed by the catering industry (€ 45,410), consulting services (€ 37,160) and construction activities (€ 36,628)

Short history of social entrepreneurship in Greece

The idea of cooperatives with a social purpose is not new for the Greek society. It has its roots in the 80s when the first agricultural cooperatives appeared. Historically, cooperatives in Greece are the most common form of social enterprise and are strongly connected to the development of local production activity. The institutional foundation for cooperatives is set primarily by Art.12 § 4 of the Greek Constitution: 'Agricultural and civil cooperatives of any kind are self-managed according to the provisions of law and their statute; they are protected and audited by the state, which is obliged to cater for their development'. This clause accords increased typical status for cooperatives, not only as civic forms of self-organization but also as valuable actors for the

¹ <https://www.siceurope.eu/countries/greece/profile>

² A map of social enterprises and their eco-systems in Europe: Greek Report (2014). European Commission

³ <https://www.techflier.com/2016/09/16/11-greek-social-enterprise-greece-you-need-to-know-about-in-2016/>

⁴ Annual Report 2017 & Action Plan for Development of the Ecosystem Social and Solidarity Economy 2017-2023, Special Secretariat for Social and Solidarity Economy, Ministry of Labor, Social Security and Social Solidarity, <http://www.ypakp.gr/uploads/docs/10679.pdf>



national economy⁵.

Now days there are four institutionalized forms of social enterprise in Greece:

- Women's agro-tourist cooperatives, most of them already established since the 1980s, under Law 1541/1985⁶;
- Cooperatives of Limited Liability⁷ (Koi.S.P.E.) for people with mental health problems, established on the basis of Law 2716/1999⁷
- Social Cooperative Enterprises (SCE) set up under law 4019/2011.
- Workers Cooperatives (law 4430/2016)

In addition to these legally defined forms of social cooperatives, some social enterprises have been established under other legal forms, such as civic cooperatives (which cover credit cooperatives and a broad range of professional cooperatives, such as pharmacists, electricians, plumbers etc.), rural cooperatives, or companies limited by shares⁸.

The fields of activity of social enterprises in Greece are very varied. The three different types of SCEs have the following fields of activity:

- **Social Integration SCE:** operate mainly in the fields of offering training/ various forms of internships to help disadvantaged groups to (re) enter the labour market and sheltered employment (where disadvantaged workers work for some hours per day with any or just symbolic remuneration).
- **Social Care SCE:** are by definition offering social care, such as care to the elderly.
- **SCE with a social and productive purpose :**operate in a very varied range of activities, including: work integration tailored for a variety of target groups and providing a range of services such as environmental protection, childcare, support for education and training, sports, music and cultural activities, nurturing culture and arts in general, strengthening democracy, civil rights and gender equality, and enable participation in the digital society, production and distribution of food and produce of good quality.

⁵ Nasioulas Ioannis (2012), Social Cooperatives in Greece Introducing New Forms of Social Economy and Entrepreneurship, *International Review of Social Research*, Vol. 2, Issue 2, June 2012, 151-171

⁶ Women's agricultural cooperatives are active in the field of employment opportunities for women, maintaining tradition and preventing the desertion of remote areas, producing food of good quality, fostering tourism.

⁷ Koi.S.P.E.s operate in tourism, environment, agriculture, services, while fields of activity are catering, cleaning, recycling, trading of small gifts and local commodities, supporting services to people with disabilities, agricultural production (e.g. beekeeping).

⁸ A map of social enterprises and their eco-systems in Europe: Greek Report (2014). European Commission



According to all statistics available the contribution of social economy in employment rates in Greece-compared to other European countries-, remains at a significantly low level⁹. The extreme diversity of enterprises referring to the concept of “cooperative”, led the previous years to the fragmentation of the social economy in Greece. Data shows that Greece has approximately 8,400 cooperatives with approx. 950,000 members (1,500-2,000 voluntary). There are also mixed organizations, volunteer organizations offering advocate services, in the form of unions, associations recognized as charity organizations, civil law non-profit partnerships, institutions, and financially-oriented associations, organisations or entrepreneurial schemes developing procedures for the labour market inclusion of excluded population groups. There are 71 women unions with 1,903 members, 68 cooperative treatment unions in psychiatric hospitals, 15 Limited Liability Social Cooperatives (KOISPE) aiming at the integration of mentally ill persons in the labour market, as well as in the provision of goods and services¹⁰.

In Greece, the practices of social economy along with the cooperative vision have a rich past and a far-reaching value for the modern social formation and the identity of the Greek economy. Law 4019/2011 on Social Economy and Social Entrepreneurship provided for the institutional recognition of Social Economy in Greece for the first time. By introducing new forms of social entrepreneurship, such as the Social Cooperative Enterprise, it enriches the available organizational forms for economic self-expression. Greece now possesses an integrated range of cooperatives potentially capable of materializing not only conventional but Social Economy visions along. Nevertheless, the Greek administrative system is not yet able to address long standing issues regarding the structuration of social economy in Greece, through a detailed, operational and inclusive recognition¹¹.

According to the Partnership Agreement (NSRF) 2014-2020 with Greece, which sets the strategy for the optimal use of European Structural and Investment Funds, social economy and social entrepreneurship support will be the responsibility of the Greek regions and may be integrated in their regional strategic plans for promoting social inclusion and combating poverty and discrimination. So far, only a small number of the intended actions to nurture social enterprises have been realized, such as the development of a communication strategy and regional awareness raising activities. The vast majority of actions could be implemented under the regional programs and may include incubators for pre-start up support of social enterprises,

⁹ Triantafyllopoulou, A. (2012). “Social Entrepreneurship – Social Enterprises: European Experience and the Greek Case”, *Review of European Studies* Vol. 4, No. 1; March 2012, Canadian Center of Science and Education, pp.115-124.

¹⁰ Triantafyllopoulou, A. (2012). Social Entrepreneurship – Social Enterprises: European Experience and the Greek Case. *Review of European Studies*, Vol. 4, No. 1; March 2012. Published by Canadian Center of Science and Education,

¹¹ Nasioulas Ioannis (2012), Social Cooperatives in Greece Introducing New Forms of Social Economy and Entrepreneurship, *International Review of Social Research*, Vol. 2, Issue 2, June 2012, 151-171



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continuous training for social entrepreneurs, business development services, etc. The major remaining gaps are the lack of dedicated financial instruments for social enterprises, the absence of organisations representing the social enterprise community and its stakeholders, underdeveloped networking and partnership arrangements, a lack of platforms for learning for social enterprises to learn from one another and from abroad, lack of public initiatives for social entrepreneurship education, and the absence of suitable governance (coordination between Ministries. partnerships with stakeholders, monitoring and evaluation)¹².

Usual process of setting up a social enterprise (national procedures)

Until 2016, according to Law 4019/2011, the Social Economy entities were registered in the General Register of Social Economy Organizations. With the adoption of the new legislative framework (Law 4430/2016), from 2017 onwards, the entities of SSE are entered in the General Register of Social and Solidarity Economics entities. The "Register" is a database, which is maintained by the Department of General Registry of SSE Organizations of the Special Secretariat for Social and Solidarity Economy of the Ministry of Labour, Social Security and Social Solidarity,

For social enterprises and workers associates under formation, an application for registration should be submitted by a member or an authorized representative using his / her tax net codes. For the registration of the Social Cooperatives of Limited Liability (KOISPE) or for the registration of the Other Bodies of Social and Solidarity Economy (e.g. Associations, Urban or Agricultural Cooperatives, etc.), a registration application is also required.

After the approval of the application for registration in the Register and the granting of the General Register of Social Economy Number (ΑΓΕΜΚΟ), the remaining categories of applications (Additional Registration, Modification, Changes History, Certificate of Member, Deletion) are accessible to the entities.

¹² A map of social enterprises and their eco-systems in Europe: Greek Report (2014). European Commission



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Portugal

General information about the country

During the 90s, Portugal pursued an economic policy determined by the convergence criteria of Economic and Monetary Union (EUM), which resulted in the entry in the euro area in January 1999. Between May 2011 and June 2014, Portugal benefited from financial assistance in support of an economic adjustment program that had also covered the relatively supervision the possible imbalances and monitoring of corrective measures. Portugal continues to be affected in many levels by the vulnerability of the financial sector - with a weak profitability of banks and a constant deterioration in the quality of its assets. The economic crisis led to a severe reduction of employment. Although the labour market situation has improved recently, unemployment remains high and the labour market segmented.

On joining the Euro, Portuguese national debt was below the 60% limit set by the Euro Convergence Criteria (Maastricht criteria). By the start of the debt crisis in 2009, the level of public sector debt had edged up to 70% of GDP. However, the recession of 2009-12, has seen a rapid increase in the level of debt, despite efforts to reduce public spending and austerity measures pursued by the government. With the rapid drop in real GDP, and austerity measures, the Portuguese unemployment rate has increased at one of the fastest rates in the EU. Effectively there are a number of factors that made it essential to deepen the knowledge of the unemployment problem but also or even mainly all mechanisms that lead to more and younger people falling into situations that allow them to border labour markets, training or education system:

- The European financial crisis that lead to a strong increase in unemployment most fundamentally to young people, low-skilled, immigrants and people in the end of working age;
- The relationship between labour market exclusion and serious health problems that increase costs for health systems and contribute to the integration problems of those who suffer;
- Rising unemployment also has a relationship with the historically tested increased crime and feelings of insecurity with the social costs resulting there from;
- The challenges of the job market today are far more complex than those faced by youth at other times of crisis.



Macroeconomics data

Population – 10.325,5 (2016)

GDP - 193.121,9 M.€ (2017)

GDP per head – 22.398,2M € (2016)

Unemployment Rate - 11.1% (2016)

By gender:

- Men - 12.2%
- Women - 12.7%

By age group:

- Under 25 years - 32%
- from 25 to 54 years - 11.2%
- from 55 to 64 years - 12.4%

Portugal Gross Household Saving Rate – 6.46% (2015)

Sectors of economic activity (individuals/thousands) - sectors contribution to GDP:

- primary sector (2017) – 304,4
- secondary sector (2017) – 1.176,8
- tertiary sector (2017) – 3.275,4

(Source: INE - National Institute of Statistics¹³)

General information on the state of art of social entrepreneurship initiatives¹⁴

The Social Enterprise concept is not fully stabilized and accepted in Portugal and it's still being discussed, in particular between the leaders of organizations representing the third sector.

The Insertion Enterprises (EI) program (programa Empresas de Inserção) was launched in 1998 within the framework of the Social Employment Market (Mercado Social de Emprego). The Social Market for Employment was created in 1996 as part of a set of measures intended to promote the integration of people with specific social difficulties or vulnerable groups, such as people with disabilities, long-term unemployed, drug addicts or young people looking for their first job. It was then part of the national strategy to eradicate poverty and social exclusion.

The IPSS (Private Institutions of Social Solidarity) has a similar concept to the EU definition of social enterprises. It is a non-profit institution, created by private initiative. There are 5,099 IPSS

¹³ **INE** (https://ine.pt/xportal/xmain?xpgid=ine_main&xpid=INE)

¹⁴ **A map of social enterprises and their eco-systems in Europe - Country Report: Portugal**
(<http://ec.europa.eu/social/keyDocuments.jsp?advSearchKey=socentcntryrepts&mode=advancedSubmit&langl&langId=en>)



(2014) registered in the Portuguese social security including associations; Misericórdias (mercies), foundations of social solidarity, social and parochial centres and institutes of religious organization.

Legal framework of Social enterprises in Portugal¹⁵

As the concept of social enterprise is not fully stabilise, the discussion has turned to the concept of Social Economy, to the "Social Employment Market" (Mercado Social de Emprego) and the 'empresas de inserção' (work integration social enterprises), aiming at the work integration of disadvantaged persons.

The Portuguese law does not encourage the creation of social enterprises. Social enterprises have particular characteristics, which are not covered by Portuguese legislation. A gap that makes difficult to create a social enterprise. The only possibility is to develop a cooperative or develop an association, however, an association does not allow investment. In June 2013 was created a new law framing the sector, the "Social Economy Law" that changed the specific laws for four of the types of "social enterprises" (Social Economy) (cooperatives, mutual societies, associations and foundations), with the exception of the "misericórdias" that are governed by the Roman Catholic Church law.

The "Social Economy Law" identifies the organisations within five "families" integrated in the Portuguese social economy, referring to whether other types of organisations may be integrated if they respect the principles set out in Article 5 of the law. This article effectively excludes more market-oriented organisations of being considered part of the Social Economy Sector, regardless of their social object. The public policy for the social economy is focused on the third sector or social organisations, but not enterprises as such. Below, the general information regarding the all type of possible enterprises.

A business can be in sole ownership or joint ownership. In both cases, the business can take various legal forms.

Sole ownership: business owned by an individual. In this case, the owner's personal assets are used to operate the business. Any debts incurred within the business are the owner's sole responsibility. The various legal forms are:

¹⁵ <http://pme.pt/como-abrir-uma-empresa-em-portugal/>
<https://www.economias.pt/custos-para-abrir-uma-empresa/>



- **Sole Trader (Empresário em Nome Individual):** the business is owned by one person and operates in the commercial, industrial, service or agricultural sectors, for example. There is no separation between the owner's personal assets and the assets of his or her business. The business operator's liability and that of his or her business are combined. Sole traders are not required to have a minimum amount of capital to start their business. Businesses legally classed as Sole Trader businesses also do not require articles of association.
- **Single-Member Limited Company (Sociedade Unipessoal por Quotas):** One person runs and is responsible for the business. This person holds all the share capital, which must be a minimum of € 5000. In the event of debts, liability is limited to the assets held by the business. The name of such businesses must include the term 'Sociedade Unipessoal' (Single-Member Company) or the word 'Unipessoal' (Single-Member) before the word 'Limitada' (Limited) or its abbreviation 'Lda'.
- **Individual Limited Liability Establishment (Estabelecimento Individual de Responsabilidade Limitada):** This is set up by an individual who wants to engage in a business activity. There is separation between the individual's assets and the assets of the business. The starting capital cannot be less than € 5000. At least two-thirds (€ 3333.33) must be in cash, and the rest must consist of items that can be used as security.

Joint ownership: business owned by a number of people (shareholders or partners) who all share responsibility. The various legal forms are:

- **Private Limited Company (Sociedade por Quotas, LDA):** require at least two partners, although there are Sociedade Unipessoal por Quotas, which have a single partner (either an individual or a collective entity). The corporate entity (and not the individual) is responsible for any company liabilities. There is a minimum capital investment of € 5000. Liability of the founders for company's obligations only extends to their own contributions to the initial capital.
- **Public Limited Company (Sociedade Anónima SA Corporation):** requires at least five shareholders, unless one of the shareholders is the State, in which case only two shareholders are needed. The corporate entity (and not the individual) is responsible for any company liabilities. The capital, which must be at least € 50000, is divided into shares. Liability for debts is limited to the company's assets. The liability of shareholders is limited to the value of their own shares.



- **Limited Partnership (Sociedade em Nome Colectivo):** in businesses with Partnership status, the partners have unlimited and subsidiary liability towards the business and joint liability towards its creditors. The minimum number of partners is two. The name of the partnership must include at least one of the partners' names and the word 'Companhia' (Company) or an appropriate abbreviation, or any other word or expression indicating the existence of other partners.
- **Limited Liability Partnership (Sociedade em Comandita, SC):** a mixed liability business. These businesses have two categories of partners: sleeping partners (Sócios Comanditárias) whose liability is limited to the amount of their shares and general partners (Sócios Comanditados) who are liable for any company debts. The general partners are liable for the debts of the business in the same way as in a Partnership. The name of the partnership must include at least one of the partners' names and the words 'em Comandita' (Limited Liability) or 'em Comandita por Acções' (Liability Limited by Shares).
- **Cooperatives:** are independent legal entities, which may be freely established and whose capital and composition may vary. Through the cooperation and mutual assistance of their members and in accordance with cooperative principles, these non-profit organisations aim to meet the economic, social or cultural needs and aspirations of their members. The body responsible for the cooperative sector in Portugal is the António Sérgio Cooperative Sector Institute (CASES), which can provide all the information needed on cooperatives.

Usual process of setting up a social enterprise

Below is an outline of the basic steps required to set up an enterprise:

- **Register at the one-stop shop.** There are two ways of starting a business in Portugal:

1. "On the Spot Firm" (Empresa na Hora): the most common way to register a business. This service enables to set up a company in less than an hour at a single contact point. As long as the partners have all of necessary documents, the company is set up immediately at one of the desks of the On the Spot Firm offices, available throughout the country, regardless of the location of the company's headquarters. The first step is to choose a name from the list of pre-approved names available at the website On the Spot Firm or to submit a name of its choice to the Commercial Registry RNPC (Registo Nacional De Pessoas Colectivas), which will issue a company's name certificate. This certificate of approval may be requested online, is valid for 90 days and may be renewed only once. If the name of the company is composed by the name of its



shareholders, it may now be approved at the moment of incorporation of the company at the one-stop shop. Then entrepreneurs need to choose one of the pre-approved standard memorandum and articles of association packs, available at On the Spot Firm and in the portfolio of packs available at the desks. The following documentation needs to be submitted at the On the Spot Firm's desk:

In case partners are legal enterprises/corporations:

- Corporate tax identification or identity card;
- Current extract of the entry in the Commercial Registry; and,
- Minutes of the Inaugural Meeting of incorporation.

At the service desk, it is possible to get both the articles of association and commercial registration. Partners will receive a certificate of incorporation, the corporate identification card, the Social Security number, the deed, and a business registration certificate.

2. "Online company setting up" (Empresa Online). This service enables to set up a company through the Internet in 1 to 2 days. The access to the service On-Line Company ('Empresa Online') can be made through the Business Portal (www.portaldaempresa.pt).

The costs are the following: Incorporation under "Empresa na Hora": € 360; Incorporation under "Empresa on-line": (i) € 360 if not incorporated with pre-approved by-laws, or (ii) € 220 if incorporated with pre-approved by-laws.

- **Open a bank account and obtain a Bank Identification Number (BIN):** Business founders must open a bank account and obtain a Bank Identification Number BIN ("NIB - Número de Identificação Bancária").

- **Sign the deed of incorporation at a notary**

- File the declaration of commencement of activity with the Tax Authority and register for VAT: The declaration of commencement of activity has to be submitted at the Tax Authorities' Offices along with evidence that the company was incorporated. Business founders must provide the Tax Authority with their BIN and their corporate identification card. Companies must also register for VAT if their sales exceed the turnover threshold



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of € 10,000. VAT registration can be done when submitting the declaration of commencement of activity.

- Apply for registration of the company at the local Commercial Registry (Conservatórias do Registo Comercial), the registry will then organise the company's publication in the Portuguese Official Journal (Diário da República).

- **Register with the Social Security Regional Centre:** The employers shall communicate the admission of employees to the Portuguese Social Security services of the area of the employee's workplace, by any written means, or online at www.seg-social.pt, within (i) 24 hours preceding the employment agreement's entry into force; or (ii) 24 hours following the beginning of the activity, whenever – due to exceptional and duly justified reasons in connection with the conclusion of very short term employment agreements or due to shift work – such notice cannot be served within the set out deadline.

Register with the Commercial or Industrial Records Office (Cadastro Comercial or Industrial) at the Directorate-General of Enterprise (DGE) or the local regional office of the Ministry of Economy within 30 days.

- **Register for the workmen's accident compensation insurance at a private insurer:** the workers' compensation insurance covers all workers and managers who receive a salary. The insurance is underwritten by a private insurer carrier and according to new regulations, it can be done after the company starts business activities. Note that social security insurance does not cover occupational accident or injury.

The process of registration could be concluded within 5 days

United Kingdom

General information about the country:

- Contextual background
 - Population: 65.64 million (2017)
 - 32.153 million Females (2011)
 - 31.029 million Males (2011)
- The UK has a literacy rate of 99% at age 15 and above



- Macroeconomics data (Population, GDP, Unemployment Rate, etc.)¹⁶
 - GDP: 41603 per capita
 - GDP Growth Rate: 0.4% (Dec 17)
 - Unemployment rate: 4.3% (Jan 18)
 - Unemployed: 838, 000 (Feb 18)
 - Long Term Unemployed Rate: 1.2% (Sep 17)
 - Youth Unemployment Rate: 12% (Dec 17)
 - Employment Rate: 75.3% (Dec 17)
 - Full Time Employment: 23,715, 000
 - Part Time Employment: 8, 533, 000

Youth Unemployment

	Birmingham	UK	EU
Population size	1,085,400	64,100,000	741,200,000
GDP/HEAD	20020.09	37955.11	222229.43
Economy Primary Sector (%)	1%	3.7%	5%
Economy Secondary Sector (%)	16%	11.6%	26%
Economy Tertiary Sector (%)	83%	80%	69%
Unemployment	30,641	823,880	24,056,000
Debt	£48 billion	£1.26 trillion	€11,550,457.5
Youth Unemployment	7,915	231,755	4,960,000
Underemployment	286,700	3,050,000	9.9 million
% With university degrees	28%	38%	28%
% With secondary school certificate	-	59%	74%
% Unqualified	15.9%	9%	-
% Illiterate	11%	16%	20%

Table 2

Some background about the UK

There are many definitions of social entrepreneurship and social enterprises. In the UK there is some debate about what constitutes a social enterprise and subsequently what is a social entrepreneur. The key ideas to understand are that:

¹⁶ <https://tradingeconomics.com/united-kingdom/indicators>



There are three main types of social enterprise and social entrepreneur:

- 1) An organisation which is a 'spin off' from an existing public-sector activity and moves from public ownership to the social enterprise sector
- 2) A person who sets up a business to trade in the market and provides 'social' services e.g. education, health care, social work
- 3) A person who sets up a business to trade in the market – they trade in any sector but operate ethically, use their profit ethically and offer an inclusive approach to business.

Definitions of Social Enterprise in the UK include:

- i. UK government; "Social enterprises are businesses that trade to help resolve social or environmental problems and improve communities. Local enterprise partnerships (LEP's) are partnerships between local authorities and businesses. They decide what the priorities should be for investment in roads, buildings and facilities in their respective area." (<https://www.gov.uk/government/publications/social-enterprises-contribution-to-local-enterprise-partnership-growth-objectives>)
- ii. Centre for Social Enterprise; "Social enterprises are revenue-generating businesses with a twist. Whether operated by a non-profit organization or by a for-profit company, a social enterprise has two goals: to achieve social, cultural, community economic or environmental outcomes; and, to earn revenue. On the surface, many social enterprises look, feel, and even operate like traditional businesses. But looking more deeply, one discovers the defining characteristics of the social enterprise: mission is at the centre of business, with income generation playing an important supporting role."
 - a. They offer a second alternative definition stating that: "A social economy enterprise operates like a business, produces goods and services for the market, but manages its operations and redirects its surpluses in pursuit of social and environmental goals." (<http://www.centreforsocialenterprise.com/what.html>)
- iii. Nesst; "a catalyst for social enterprises in emerging markets"; "A social enterprise is a business created to further a social purpose in a financially sustainable way." (<http://www.nesst.org/social-enterprise/>)
- iv. According to socialenterprise.org.uk; "Social enterprises are businesses that trade to tackle social problems, improve communities, people's life chances, or the environment. They make their money from selling goods and services in the open market, but they reinvest their profits back into the business or the local community. And so when they profit, society profits." (<http://www.socialenterprise.org.uk/about/about-social-enterprise>)
- v. **According to SocialEnterpriseMark.org**; "Currently, there is no UK-wide, legal definition of a social enterprise. In general, social enterprises are companies that use



business to fulfil social purposes or meet a social need.”
(<http://www.socialenterprisemark.org.uk/social-enterprise-definition/>)

- vi. The European Commission; “Social enterprises combine societal goals with entrepreneurial spirit. Launched by a group of citizens, these organisations focus on achieving wider social, environmental or community objectives. The European Commission aims to create a favourable administrative and legal environment for these enterprises in order to operate on an equal footing with other types of enterprises in the same sector.”
 - a. It continues saying: “A social enterprise is an operator in the social economy whose main objective is to have a social impact rather than make a profit for their owners or shareholders. It operates by providing goods and services for the market in an entrepreneurial and innovative fashion and uses its profits primarily to achieve social objectives. It is managed in an open and responsible manner and, in particular, involves employees, consumers and stakeholders affected by its commercial activities.” (http://ec.europa.eu/growth/smes/promoting-entrepreneurship/we-work-for/social-economy/enterprises/index_en.htm)

Legal Framework for Establishing a Social Enterprise

According to the *European Centre for Not-for-Profit Law*, the United Kingdom possesses one of the most ‘advanced legal infrastructures for Social Enterprise/Economy’, despite there being no legal definition of a Social Enterprise in the UK. The UK Government defines an SE as a ‘business with primarily social objectives whose surpluses are principally reinvested for that purpose in the business or community, rather than being driven by the need to maximize profit for shareholders and owners’ – (Social Enterprise: A Strategy for Success)

This essentially means that in the UK the definition of Social Enterprise is much vaguer than in the rest of Europe, with no legal parameters meaning an SE can be just about anyone who runs a business that has some form of social output. Most Social Enterprises in the UK act as ‘Limited Liability Companies’, ‘Community Interest Companies’ or Industrial and Provident societies, but they can also take an unincorporated legal form (unincorporated association/trust). Usually the purpose and nature of the Social Enterprise will determine which of these institutional forms they will take, with some information below on the most common forms:



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Community Interest Company

Introduced in 2004, the CIC offers increased choice and flexibility. A Community Interest Company is a limited liability company that aims to utilise business to help the community and is focused on that objective over profits. CICs are required by law to state their social purpose, are given an asset lock and have caps on the maximum dividend (35% of profits) and interest payments that it can make. The CIC structure 'provides a clear signal to investors that the enterprise operates primarily for the benefit of the community'. These legal guidelines ensure assets and profits are retained within the CIC for community purposes, or transferred to another asset-locked organisation, such as another CIC or charity. A CIC cannot be formed to support political activities and a company that is a charity cannot be a CIC, unless it gives up its charitable status. However, a charity may apply to register a CIC as a subsidiary company.

Industrial and Provident Societies

The Industrial and Provident Societies (IPS) are again used for 'conducting business or trade...for the benefit of the local community', or to set up cooperatives. These organisations are democratically controlled to ensure their involvement in the decisions of the business.

Charities

A public benefit organisation, charities are defined as a 'body or trust which is for a charitable purpose that provides benefit to the public' (Charities Act 2011) and are a very common legal form of Social Enterprises within the UK. In part, it is so common as increasing numbers of charities are moving away from traditional models of fundraising and becoming more business-like in order to ensure their sustainability. In addition to this, tax is an important consideration for some organisations where the retention of surpluses is essential, resulting in an increase in approaches which reduce tax burdens. In these cases, the tax breaks associated with charitable status can be an important factor and mean that having a charitable structure as part of the group is worthwhile.

Company limited by guarantee or shares

The most common legal structure in regular business. Many social enterprises also choose these legal forms because they are very flexible when it comes to governance and getting investment. To ensure a standard company is a true social enterprise it will need to ensure it has a social mission written into its Memorandum and Articles of Association and is clear about reinvesting its profits.



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The Netherlands

Demographics

The Netherlands is located in the North-West of Europe. Amsterdam is the capital. According to the most recent numbers of Statistics Netherlands there are 17.2 million registered inhabitants in the Netherlands at this moment¹⁷.

Economic situation

The Netherlands, the sixth-largest economy in the European Union, plays an important role as a European transportation hub, with a persistently high trade surplus, stable industrial relations, and low unemployment. Industry focuses on food processing, chemicals, petroleum refining, and electrical machinery. A highly mechanized agricultural sector employs only 2% of the labour force but provides large surpluses for food-processing and underpins the country's status as the world's second largest agricultural exporter. The Netherlands is part of the euro zone, and as such, its monetary policy is controlled by the European Central Bank. The Dutch financial sector is highly concentrated, with four commercial banks possessing over 80% of banking assets and is four times the size of Dutch GDP. In 2008, during the financial crisis, the government budget deficit hit 5.3% of GDP. Following a protracted recession from 2009 to 2013, during which unemployment doubled to 7.4% and household consumption contracted for four consecutive years, economic growth began inching forward in 2014. Since 2010, Prime Minister Mark Rutte's government has implemented significant austerity measures to improve public finances and has instituted broad structural reforms in key policy areas, including the labour market, the housing sector, the energy market, and the pension system. In 2016, the government budget returned to a surplus of 0.3% of GDP, with economic growth of 2.1%, and GDP per capita finally surpassed pre-crisis levels. The Dutch government projects steady but modest economic growth of 2.1% in 2017 and unemployment decreasing to 4.9%¹⁸.

General information on the state of art of social entrepreneurship initiatives

Since 2012, Social Enterprise NL serves as a platform that represents, connects and supports social enterprises in the Netherlands (www.social-enterprise.nl). The organization's mission is to accelerate social innovation by strengthening social enterprises in the Netherlands. This is done by identifying, making visible, connecting, representing and supporting them, which will give

¹⁷ <https://www.cbs.nl/en-gb/visualisaties/population-counter>, consulted 10-04-2018

¹⁸ <https://www.forbes.com/places/netherlands/>, consulted 13-04-2018



social enterprises the chance to scale up and increase their impact. Social Enterprise NL will make a great effort in representing social entrepreneurship towards the government, in order to create incentives for stimulating legislation, access to capital and the improvement of education on social entrepreneurship.

The social enterprise is a growing phenomenon worldwide and in the Netherlands this group of entrepreneurs is also growing by the day. The term 'social enterprise' is still young in the Netherlands, certainly in comparison with our surrounding countries. Employment in social enterprises in the Netherlands increased by 24% between 2014 and 2016. This is significantly higher than with regular SMEs¹⁹.

Currently the number of social enterprises in the Netherlands is still limited with approximately 4,000– 5,000 companies in place. Not all of these companies truly fit the definition regarding the ambition to scale up and drive system change. In comparison with other European countries, there is still relatively little data available on the social enterprise sector. Therefore, it is not possible to give an exact indication of the size of the sector in the Netherlands. The majority of Dutch Social Enterprises is active in six broad sectors: Biosystems, Cleantech, Economic Development, Civic Engagement, Health and Wellbeing, and Education. Based on a sample of 700 Social Enterprises, Biosystems is the largest segment consisting mostly of organic farmers. Cleantech is the second largest and highly diversified sector focused on new sources of energy and energy efficiency. Health and Wellbeing is the least diversified sector, with many care farms. In Economic Development there are a broad range of fair trade organizations. Education has only a limited number of Social Enterprises.

Sector	Examples of social issues	Estimate of share of social enterprises in sector
Cleantech	- Depletion of natural sources - Climate change	15%
Biosystems	- Careless handling of animals and nature - Waste pile-up	35%
Economic Development	- Unfair distribution of wealth in the value chain - Limited chances for bottom-of-the-pyramid - Social inequality in the Netherlands	10%

¹⁹ https://www.social-enterprise.nl/files/6814/6425/0554/Social_Enterprise_Monitor_2016.pdf



Civic Engagement	- Limited access to labour markets for vulnerable groups - Lack of social cohesion	10%
Health & Wellbeing	- Rising health care costs - Obesity - Welfare of seniors and chronically ill - Waiting lists	15%
Education	- Decreasing quality of education - Underutilizing students potential - Mismatch between education and labour market	<5%
Other	- Housing need - Diminishing interest in religion and meaning fullness	10%

Table 3

Legal framework of Social enterprises

In the Netherlands, there is no official legal entity for the social enterprise. The majority of social enterprises are operating as a Private Limited Company (BV). Others are registered as a Foundation (Stichting) or a Cooperative (Coöperatie). Some companies have a Private Limited Company AND a Foundation²⁰.

Private limited company, the Dutch 'BV'

One of the options is to create a legal entity in the form of a 'Private Limited Company', or in Dutch a Besloten Vennootschap (BV). The main benefit of a Private Limited Company is that it's an autonomous entity. This means that the Private Limited Company is generally speaking liable for any debts, rather than you as an individual. As a director, you are an employee of the Private Limited Company and you act on its behalf. It is possible to set up a Private Limited Company on your own or with other individuals and/or legal entities.

There are essentially three elements to setting up a Private Limited Company:

- Incorporation (civil-law notary) by notarial deed (statutes);
- Deposit (min. €0.01 – cash or in kind);
- Listing in Trade register (Handelsregister) – usually carried out by civil-law notary (you remain personally liable until registration is complete)²¹.

²⁰ www.social-enterprise.nl

²¹ <https://business.gov.nl/starting-your-business/choosing-a-legal-structure/private-limited-company/>



Foundation, the Dutch 'Stichting'

If you are looking to support a given social or not-for-profit cause, e.g. nature conservation, cultural heritage or a charity, one option may be to create a legal entity in the form of a 'Foundation', or in Dutch a Stichting. A Foundation is a legal entity, which means that its officers are theoretically not liable for any of its debts. There are, however, exceptions to this rule. For example, mismanagement, negligence or failure to list the Foundation in the Commercial Register.

Setting up a Foundation

You will need a civil-law notary to draft a deed, stating that you have created a Foundation and listing its statutes. It is possible to set up a Foundation on your own or with other individuals and/or legal entities, e.g. a Private Limited Company. Statutes often also include rules about the foundation's organisation. Be aware that you will need a civil-law notary to amend the deed whenever you need to amend your foundation's statutes. It's mandatory to list your Foundation in the Commercial Register (Handelsregister) maintained by the Chamber of Commerce (KvK)²².

Cooperative, the Dutch Coöperatie

If you're interested in the benefits of working as a collective, e.g. pooling your purchasing and marketing efforts, one option may be to create a legal entity in the form of a 'Cooperative' (Coöperatie). A Cooperative is a special type of association that enters into specific agreements with and on behalf of its members.

Setting up a Cooperative

You can set up a Cooperative with one or more partners. Control rests with the 'general meeting of members' (GMM) or in Dutch the Algemene Ledenvergadering (ALV). One of the ALV's tasks is to appoint a board to manage the cooperative's affairs. You will have to get a civil-law notary to draft a deed to establish the cooperative and list the cooperative in the Dutch Commercial Register (Handelsregister). Members contribute to the cooperative's set-up and running costs. Any profits are divided based on the share of the turnover generated by members on behalf of the Cooperative. Members can make their own arrangements about sharing in the profit²³.

²² <https://business.gov.nl/starting-your-business/choosing-a-legal-structure/foundation/>

²³ <https://business.gov.nl/starting-your-business/choosing-a-legal-structure/cooperative/>



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Process of setting up a social enterprise

Because there is no official legal entity for the social enterprise the process of setting up a social enterprise in the Netherlands is no different than setting up a 'normal' business.

The Chamber of Commerce (KvK) focuses on the most important aspects of successfully setting up a business in the Netherlands. Before visiting the Chamber of Commerce to register your (social) enterprise you have to consider the following issues:

- A permit to start a business in the Netherlands (only for nationals who originate from outside the EU/EEA or Swiss);
- A business plan;
- Legal form and trade name of your enterprise;
- Taxation and necessary insurance;
- Business location, commercial lease;
- A (model) agreement in order to have certainty about the nature of the working relationship²⁴.

²⁴ https://www.kvk.nl/download/KvK_Brochure_SYOB-engels_tcm109-400541.pdf



Good practices

Existing good practices of adult training and/or other initiative in providing training on Entrepreneurial and Start-ups user-centre innovation skills in other European countries.

Greece

1. Impact Hub Athens,

- a. Provides several services to start-up enterprises such as training, networking opportunities, place to collaborate and work, knowledge points and expert advice, renting of space for enterprises. The Impact Hub is member of a global network of Hubs which means that they can collaborate and exchange know-how and expertise and share with its members. They can organise themed discussions, discuss case studies, test and use new technologies, organise events and competitions but also, set up training sessions with new entrepreneurs or people interested in becoming entrepreneurs. Their objectives are to provide knowledge and support to both social enterprises as well as general companies.
- b. Their strength is their members and the expertise and know-how they share. They can organise networking activities between people and start-ups to find common interests but also to motivate innovation.
- c. Infrastructure: building with shared desks to collaborate, infrastructure to use, access to experts and mentors, access to training and database of learning resources, access to templates and business models, etc.

Praxis Business Coaching Center

- a. The Praxis Business Coaching Center is a spin off, off the NGO Praxis. They have commenced the Business Coaching Center as support to people who wish to start a new business and need help in various stages or phases. These phases are:
 - i. From an idea to a concrete business idea,
 - ii. How to write a business plan,
 - iii. Marketing and digital social media marketing,
 - iv. Financing and cost-setting
 - v. Follow-up and expansion
 - vi. Legal and accounting support
 - vii. After 6 months to 1-year support (i.e. after running for at least 6 months, the entrepreneur can apply for further support which deals with running a business, management and sustainability).



- viii. Any other topic.
- b. The way they operate is for the interested party to primarily apply through their website. The interested party answers questions on an online form, the questions are basically asking for the business plan of the company and submits the form. The application process is open twice a year.
- c. Once the applications have been reviewed, the applicant is invited for an interview with the business mentors of the Business Coaching Center. If the Coaching center believes that the applicant has a viable idea, or they pair him/her up with experienced entrepreneurs and business mentors from the private sector.
- d. The mentor and the future entrepreneur discuss over a period of 4 months with weekly meetings taking place. The mentors are usually acknowledged professionals from the private sector with decades of experience. Their background varies from banking, finance, retail and investment sector.
- e. Following the 4-month coaching period, the entrepreneur will continue on their own. However, they can re-apply for coaching and mentoring as a support for maintaining their business.

Grow Greek Tourism Online

- a. The Grow Greek Tourism online is an initiative by the Ministry of Tourism and www.visitgreece.gr (Hellenic Tourism Organisation), who combined have produced 26 educational modules on Digital Marketing. The emphasis is on Tourism but any entrepreneur or start-up can use the Greek educational material to expand and market their service or products.
- b. The topics are:
 - i. Networking opportunities (2 units)
 - ii. Create your own online presence (6 units)
 - iii. Make the first step for a successful internet presence (4 units)
 - iv. See how search is conducted (6 units)
 - v. Use email marketing (5 units)
 - vi. Exploit search (3 units)
 - vii. How to ensure you are in the search results (5 units)
 - viii. Search engine marketing – SEM(4 units)
 - ix. Enhance the SEM strategy (4 units)
 - x. Analytics for beginners (3 units)
 - xi. Ensure analytics success (3 units)
 - xii. Local awareness (2 units)
 - xiii. Location services – people nearby finding you (3 units)



- xiv. Social media presence (4 units)
- xv. More about social media (4 units)
- xvi. Mobile devices and opportunities (3 units)
- xvii. Exploit mobile devices (5 units)
- xviii. Market yourself in other websites (3 units)
- xix. More on display ads (3 units)
- xx. Expansion abroad (7 units)
- xxi. Fully exploit video (6 units)
- xxii. Create your own ecommerce site (2 units)
- xxiii. Increase your e-sales (3 units)
- xxiv. Design your online business strategy (5 units)
- xxv. Commence with content marketing (6 units)
- xxvi. Turn data into insights (5 units)
- xxvii. Bonus material (5 modules)

The below are business initiatives that provide training and support to start up entrepreneurs, information and know-how but also individual support if needed. The network Koinsep.org works only with social enterprises and is considered the main information point when someone is interested in setting up, running and managing a social enterprise in Greece.

- b. Athens Center for Entrepreneurship and Innovation-ACEin
- c. Athens Startup Business Incubator
- d. Hellenic Start Up Association
- e. Orange Grove
- f. startup.greece
- g. Youth Entrepreneurship Club
- h. Network Koinsep.org
- i. Action Finance Initiative
- j. FOUND.ATION

Use of new technologies in good practices

Praxis Business Coaching Center: The Praxis center works mostly with traditional technologies when the mentoring pairs have been set up. These are emails, social media and communication tools.

In the case of the Grow Greek Tourism Online, the units are all designed modular and are comprised of video, text, self-evaluation questions and references. All material are located on



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an eLearning platform <https://learndigital.withgoogle.com/greektourism/>, but the two organisation also organise training seminars in various locations in Greece. Their online platform has many categories which make it very user friendly when searching for information.

Existing good practices in successful social entrepreneurship projects

1. NeiOrizontes (New Horizons) – Athens, Greece
2. Gefsi apo Xorio: Koinsep, Karditsa, Greece
3. Café Mirtilo, Athens, Greece
4. Koinsep RODA, Karditsa, Greece

Portugal

Programa de Apoio a Empreendedores Sociais, PAES Aceleração (Program for Support to Social Entrepreneurs, PAES Acceleration)²⁵

It's a program promoted by Santa Casa da Misericórdia in Lisbon, through its Department of Entrepreneurship and Social Economy (DEES), which aims to capture projects that develop innovative products and services aiming to solve problems and needs in the context of the Social Economy. The program aims to support the validation of sustainable business models, enhancing its leverage by planning, developing and implementing short, medium and long-term strategies.

Target audience:

This program is addressed to Start-ups and business projects with an innovation component, which have been developed for at least 6 months at the application date, and non-profit and charitable organisations with at least 6 months of activity in the industry.

Awards:

The 3 finalists will have access to an internationalization program, which includes foreign travel and networking meetings.

The highest ranked application, among the three finalists, will be awarded with a monetary prize of € 15,000.00 (fifteen thousand euros).

²⁵ <https://lisbon.impacthub.net/eventos/paessionion>



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IES-SBS TRAINING PROGRAMMES 2018²⁶

ES-Social Business School is the first business school focused on Innovation and Social Entrepreneurship. They were the starting point for a path dedicated to Social Innovation in the creation of sustainable business solutions, offering a portfolio of training, research and consulting. They rely on excellence and a strong network of partners to inspire, train, support and connect organisations and people from all sectors of a converging economy.

IES-Social Business School consists of laboratories that investigate the main issues under Innovation and Social Entrepreneurship, complementarity and a logic of action-research, together with partners and clients from different sectors of activity.

It is in December 2014 that IES affirmed itself as Social Business School. Throughout this year 1000 alumni were formed by IES-INSEAD programmes, with a record number of Bootcamps achieved in a year (10) new and 10 alumni as trainers. The launch of the Scaling for Impact programme was celebrated with 2 editions, with a total of 60 graduates and 20 participating projects.

The official launch of the Social Investment Lab was held, a project of IES and the Calouste Gulbenkian Foundation, in partnership with Social Finance UK, consisting of a reference knowledge centre in the field of social investment, seeking to disseminate international best practices and Innovative financial instruments, studying its applicability to the Portuguese reality. The launch of the Social Investment Taskforce: catalysing the social investment market in Portugal, which, after one year, is expected to draw political recommendations as a catalyst for the social investment sector in Portugal. Also, in 2014, we decided to create a Social Business Laboratory that has an exclusive partnership with B Lab to bring the B Corp movement to Portugal and Lusophone Africa. MIES is approaching its final stretch and in Maputo, Mozambique, 13 ES + Maputo were identified and supported. The start of the 1st INSEAD Social Entrepreneurship Award was also celebrated.

The training programme for the 17 Municipalities of the Metropolitan Area of Porto was also completed, encompassing activities such as strategic planning, mapping of entrepreneurship and social innovation projects, technical capacity for building of municipalities, and the implementation of projects that generate positive social impact in the city and respond to identified social needs.

²⁶ <https://www.ies-sbs-en.org/>



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United Kingdom

ENACTUS (Specifically Enactus UK) (<http://enactusuk.org>)

Enactus is an international non-profit organisation dedicated to inspiring students (primarily University students) to improve the world through entrepreneurial action. The name 'Enactus' actually stands for **ENT**repreneurial **ACT**ion for **US** all, it provides a platform for teams of university students to create community development projects and social enterprises that put beneficiaries' ingenuity and talents at the centre of improving their own livelihoods.

Enactus' mission is to enable progress through entrepreneurial action by creating the framework for our network to develop entrepreneurial focused community outreach projects that have a positive impact in people's lives, our goal is to enable sustainable human progress.

To develop values driven leaders. Enactus believes that entrepreneurship and business can play a critical role in providing solutions to some of the world's most challenging problems. By connecting generations of leaders to learn from each other and challenging students to apply that learning to solve real world problems within their own communities, they develop stronger leadership skills as well as an understanding that they can have a positive impact on society through entrepreneurial action.

Enactus works at the most grassroots level as a **society** in a University (i.e. Cardiff University Enactus), this University team then belongs to the wider Enactus UK, which belongs to the global Enactus network. Students who join the society are passed on entrepreneurial skills and knowledge through both their peers who have been in the society before them, as well as Enactus UK, who employ full time staff to facilitate student entrepreneurial action. There are currently nearly 60 Enactus teams in the UK and many more spanning the globe.

(A case-study below on '**Rubisco**' is actually an example of a student Enactus project turned into a fully functioning social enterprise)

The School of Social Entrepreneurs (<https://www.the-sse.org>)

The School for Social Entrepreneurs (SSE) brings together people who want to change things for the better. People tackling urgent issues like poverty, education, inequality, health, climate change and much more. Every year, they help more than 1,000 people learn how to transform their communities and help people in need.



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The SSE support social entrepreneurs, intrapreneurs and charity leaders, running courses that equip them with the skills and networks needed to create lasting change. The SSE also help in other ways too, like connecting these people with funding and mentoring. Currently they operate 11 schools across the UK, Canada and India.

They help coach their students to create social enterprises and 50% of their students work in the 20% most deprived geographical areas of the UK, ¼ of the students they work with have had direct experience with the social issue they want to address. Aided by their fellows, who are all successful entrepreneurs and social entrepreneurs, The SSE works to facilitate and install social entrepreneurial attitudes in the people they work with.

The SSE provides a number of courses/programmes including:

- Third Sector Digital Leaders
- The Fellowship Programme
- Replication and Social Franchising
- Handling Difficult Conversations
- Negotiation Skills Training
- Measuring Social Impact
- Etc. (a full list is here: <https://www.the-sse.org/our-courses/>)

They also provide **bespoke training programmes** for their students.

One of their most popular programmes is the Llyod Bank Social Entrepreneurs Programme, at the moment they estimate that with each organisation a student creates, they also create an average of 2.3 jobs, they forecast that in the first 5 years of the programme 7,000 jobs were created.

Use of new technologies in good practices

The School for Social Entrepreneurs uses their website to promote themselves and the work that they do. The website can be navigated to learn about the history and current work of The SSE, but also has a few other functions that are very useful.

- 1) A blog/'story' section, this is used to promote the work of their students and fellows, providing inspirational insight into established social enterprises
- 2) A promotion of their courses and where they are taking place. While they don't have any **online** courses, The SSE does use their website to highlight where some of their



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courses will be taking place and even use their website to allow people to sign up for courses: <https://www.the-sse.org/courses/handling-difficult-conversations/>

- 3) 'Meet our students/fellows' section, for people to learn about the work that the SSE do **through** those they work with, this makes it much more personal and perhaps easier to understand for some, you can see some of the people behind projects and learn about their journeys through social entrepreneurship

The SSE's website is very easy to navigate, with more than 1 way of reaching a different area on the website on a single page, while this may seem unnecessary it actually makes the user experience much easier, also the addition of personal stories is a great factor for giving people a well-rounded idea of the work that they do. It is much more interesting to read a personal and **relatable** story, than simply understanding a concept through lots of text.

The Netherlands

Academic Honours Course: The Future Entrepreneur

Course: Academic Honours Course: The Future Entrepreneur²⁷

Provided by: Amsterdam Centre for Entrepreneurship. In this centre VU University (VU) and University of Amsterdam (UvA) collaborate

Course description:

The course The Future Entrepreneur is concerned with entrepreneurial opportunities and the role of the entrepreneur in the year 2030. A variety of lecturers will present their perspectives for the future with regard to their topics of specialisations. This course challenges its participants to think further and to anticipate what may be lying ahead. It focuses on future trends as well as the role of the entrepreneur. Innovative concepts are dealt with and further developed during this course.

In addition to the classes, there is also a digital learning environment.

²⁷ <https://vu.nl/nl/opleidingen/overig-onderwijs/honours-programme/interdepartmental-courses/the-future-entrepreneur/index.aspx#>



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Case studies

Greece

Case study 1 – New Horizons, Athens, Greece

Name of organisation: New Horizons,

Sector of activity: design and maintaining of gardens, office cleaning services

Number of employees: +20 and expanding continuously. Type of employees: ex-prisoners

Year founded: 2014

Objective: a social enterprise with the human factor in the centre, providing opportunities

Brief description about the social project

For designing and developing of the marketing plan, the social enterprise primarily identified the needs and skills their members had. Secondly, they studied the business environment and the market conducting a short market analysis to identify activity sectors. Once the sectors were identified, gardens and cleaning, they started setting goals, discuss pricing policies, training and organising the appropriate promotional actions.

Aims and goals to be achieved

To help the ex-prisoners and members of the social enterprise to have the necessary support to re-enter society and working life with dignity and self-esteem.

What has been done so far

The social enterprise has several cleaning contracts with public sector organisations and is continuously expanding. In addition, they are maintaining the gardens of universities and those of private clients. They are participating in many conferences discussing and presenting their case study and have strategic cooperation with training centers and mentoring programmes.

What are the expected results

The aim is to grow the company and get more contracts.

How were the results achieved

Through hard work, raising awareness of the SEs work and activities, networking on regional and governmental level, participating in conferences, providing exceptional quality in their work, etc.



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Main obstacles and difficulties encountered

The main obstacles were bureaucracy and the new legal framework related to the social enterprises in Greece. Having members who belong to vulnerable target groups, the social enterprise was in need of alleviating measures, quick decision in order to commence their activities, and possible funding opportunities until they gained their clients' trusts.

Lessons learned

Three pieces of advice that would be helpful to people at the beginning of their journey running a social enterprise. If help needed, what type of help would this be?

- a. Never give up and fight for what you want
- b. Always provide high quality of your work and be consistent and dependable
- c. Use all the tools and resources that you can.

Case study 2 – Gefsi apo Xorio, Karditsa, Greece

Name of organisation: Gefsi apo Xorio (Taste from the Village),

Sector of activity: traditional products

Number of employees: 6 and expanding. Type of members: local producers

Year founded: 2015

Brief description about the social project

The five farmers, led by their President Yiannis Zissopoulos, began to produce, standardize, package and promote their traditional products to the local market. The "Taste from the Village" produces spoon sweets, pasta, cookies and rustic pies. The products are sold in restaurants and traditional shops.

Aims and goals to be achieved

To connect local farmers and producers under the social enterprise and create standardised and labelled goods and traditional products. These will then be distributed regionally to restaurants, shops and possibly even export. As a social goal, the farmers are helping people and families in economic difficulties, provide food for migrants and help the church in providing food to people in need.

What has been done so far

The social enterprise is already working with five farmers and they produce various traditional products.



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What are the expected results

The aim is to grow the farmers network and work with as many as possible.

How were the results achieved

They reviewed lessons learned by other SEs, identified successful SEs in Greece and tried to work towards similar models.

Main obstacles and difficulties encountered

They find it difficult to gain the trust of the local producers because until now, all efforts to create a cooperative or sell through a cooperative failed. The social enterprise is trying to change this perspective.

Lessons learned

Three pieces of advice that would be helpful to people at the beginning of their journey running a social enterprise. If help needed, what type of help would this be?

- a. Well prepared for bureaucratic issues that might arise. Be knowledgeable about SEs, legal system, accounting needed,
- b. Have support, mentoring and specific training opportunities,
- c. Have members that have management background
- d. Balance between economic activity and social mission

Case study 3 – Café Myrtilo, Athens, Greece

Name of organisation: Café Myrtilo,

Sector of activity: cafeteria and art center

Number of employees: 90% of employees are people with disabilities,

Year founded: 2013

Brief description about the social project

Myrtilo has been operating as a cafeteria and arts centre since October 2013. It is an innovative self-supporting business and training entity, where all employees are jointly responsible for its viability.

Aims and goals to be achieved

Those who work in Myrtilo receive daily multi-dimensional training, a training which initially was based on the great arts (literature, drama and music), on the cultivation of self-awareness and



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on the transmission of the values of sociality and solidarity. The goal is for those who work in Myrtillo to learn a job that will secure for them a living, but also a job that will give them the joys of sociability and a sense of creativity.

What has been done so far

They have staged more than 400 events, can organise conferences and seminars, operate as a cafeteria each day, help their target groups as much as possible.

What are the expected results

To continue to operate and expand to create similar operations. To have more TG members work in the coffee shop and be able to help more disabled people.

How were the results achieved

In the beginning they were operating from a different building and through network and motivation, they cooperated with the municipality of Athens to help them move to a donated building near a park. This was achieved through hard work and as recognition of the work they do. They expanded their services, they provide quality products and have become a hotspot for locals.

Main obstacles and difficulties encountered

No incentives from the government as a social enterprise, the costs of the operation and the difficulty in competing with a regular coffee shop, setting up a functional network of collaboration with experts.

Lessons learned

Three pieces of advice that would be helpful to people at the beginning of their journey running a social enterprise. If help needed, what type of help would this be?

- a. Incentives (funding, training, support, mentoring, infrastructure etc.) from regional and central government
- b. Be prepared to spend a lot of time in setting up your company
- c. Know what you want to achieve.

Case study 4 – Social Enterprise Roda, Karditsa, Greece

Name of organisation: Roda

Sector of activity: Theatrical center

Number of employees: 6



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Year founded: 2013

Brief description about the social project

The aim of the theatrical workshop is to develop the creativity, imagination and awareness of children in relation to the world around them. Stimulating them through a fairy tale, a verse, a newspaper clip, a musical phrase, an image that will be selected by the trainers, each time based on the needs of the group, the children and the teenagers will express themselves, discover, create using: theatrical expression, painting, clay, and sounds. In this way they will learn about themselves, their particular inclinations and needs, and will learn to work within the group with respect for the peculiarity of the other without suppressing their own expression, based on cooperation and common creation.

Aims and goals to be achieved

Help children and teenagers express themselves through art and have the necessary tools to interact and learn about themselves. They learn to respect people and understand differences.

What has been done so far

They organise theatrical working groups, seminars and workshop and cooperate with local and regional actors (local authorities, schools, private companies etc.). They have their own facilities where their activities take place.

What are the expected results

To organise more activities and provide additional services to the local population, to cooperate with more experts, to receive funding (EU) in order to research and use additional methodologies.

How were the results achieved

Through the motivation and persistency of the team who set up the social enterprise.

Main obstacles and difficulties encountered

Legal framework and accounting system for social enterprises. Time and budget needed to continue operations (no government incentives for SEs).

Lessons learned

Three pieces of advice that would be helpful to people at the beginning of their journey running a social enterprise. If help needed, what type of help would this be?

- a. Work hard, organise your time
- b. If you don't know, ask! Find learning resources and upskills yourselves



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c. Rely on yourself.

Portugal

Case study 1 – SPEAK, Portugal²⁸

Name of organisation: SPEAK (<https://www.speak.social/pt/>)

Sector of activity: Exchange of languages and cultures

Year founded: 2012

Brief description about the social project

SPEAK was created with the purpose of solving problems of socio-cultural exclusion and to integrate immigrants in the communities. It is a program of sharing linguistic and cultural knowledge breaking down the language barrier and bringing people together. Anyone can sign up to learn or volunteer to teach a language and culture of their knowledge. SPEAK groups have people of different backgrounds. Throughout this learning process, participants know the "other", learn and explore common interests, break prejudices, misunderstandings and promote understanding and cooperation between cultures. Parallel to the classes, there are social events created by the community itself. SPEAK is open to anyone over 15 years old.

Aims and goals to be achieved

SPEAK aims to solve the problem of social exclusion of migrants, breaking down barriers and promoting equality. They help to solve the problem of the social exclusion of migrants and contribute to their integration in the cities where they live through a program of sharing of linguistic and cultural knowledge that overcomes the linguistic barrier and brings people of different origins closer together. SPEAK is already present in seven Portuguese cities as well as in Turin (Italy) and Berlin (Germany).

What has been done so far

SPEAK project was created in order to solve the problem of socio-cultural exclusion by promoting the exchange of languages and cultures. The idea was born from an existing project in the Associação Fazer Avançar (AFA), the Leiria Language Exchange. This social enterprise is already working for six years. They have training centres in Leiria, Caldas da Rainha,

²⁸ <https://www.speak.social/pt/>



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Coimbra e Lisboa. They have volunteer teachers that are native people who live in the cities. There have volunteer teachers from everywhere from China to the United States. At SPEAK they share their knowledge about their language and culture. The low-cost commitment was achieved through special conditions for the functional and comfortable classrooms.

They have also the SPEAK PRO version, a competitive tool for current challenges of the labour market.

What are the expected results

The success of international experiences is not only due to the knowledge of the language, but also through the knowledge of culture and the capacity of interaction (creation of empathy) with the local citizens. SPEAK PRO has professional language courses with a focus on functional language and cultural learning that bring students closer to native speakers. SPEAK PRO classes are for companies and individuals that have specific needs (urgency, focus, intensity and duration of the course).

By the end of the year, SPEAK expects to have trained more than two thousand people and obtain revenues of € 66 thousand.

How were the results achieved?

SPEAK started after Hugo Menino Aguiar, the founder, work on Google in Dublin (Ireland). Despite speaking the language and having a good financial condition, it became difficult to create a network of contacts. So, Hugo thought about people with financial and integration difficulties. While participating in the Avançar Association, he decided to create SPEAK. Later, two more people joined him.

In 2017 they have made an investment of € 500 thousand in the seed phase, thanks to a group of impact investors and Portuguese and foreign foundations. They have been growing slowly since 2014. With the financing impact, which combines the financial return with the effect generated in society, SPEAK has specific objectives until 2020, such as "being in the main European capitals" with the traditional model, which will be a "case study" for a model of franchising, which can be extended to other European cities.

Case study 2 – IMPACTRIP, Portugal²⁹

Name of organisation: IMPACTRIP (<http://www.impactrip.com/who-we-are/>)

Sector of activity: Tourism

²⁹ <http://www.impactrip.com/>



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Year founded: 2013

Brief description about the social project

ImpactTrip is an incoming tour operator that promotes Responsible Tourism in Portugal. ImpactTrip aims to fight social inequalities through solidarity tourism. Building partnerships with social organizations, this is "the first Portuguese agency" dedicated to solidarity tourism providing different experiences in Portugal.

Aims and goals to be achieved

Defining itself as a social travel agency, its mission is to "combat social inequalities through solidarity tourism". The objective is to combine the best of tourism, traveling like a local, and customized volunteering to offer unique meaningful travel experiences. Discover Portugal on a responsible and unforgettable trip that combines the best of guided tours, typical restaurants and exclusive local activities with volunteering experiences in social and environmental projects which have a real impact. Get to know the locals, absorb Portuguese culture and get the best out of your holidays in a volunteering trip that will make your stay a meaningful experience.

What has been done so far

The social enterprise is already working for five years. They want to invest in rural areas and the interior of the country, areas somewhat marginalized and who have much to offer with offers in Porto, Lisbon, Azores, Peniche Sesimbra and Algarve. All experiences are adapted according to the profile of the traveller, that is, the projects in which the tourists go to work are chosen according to their competences and preferences.

What are the expected results

Soon, two more experiences will be included to the range of offerings such as the Authentic Port project that will lead the travellers to know the Invicta city (Porto) through projects of social or environmental nature or the Build the Future project where people help building houses for disadvantaged families. In the future, one of the major projects involves the creation of Inclusion Routes, programs that include visits to Lisbon in which the all city's corners are revealed by homeless citizens (an initiative that already exists in Porto).

How were the results achieved?

The project was developed within the PAES - Program of Support to Social Entrepreneurs where they received support, training and a physical space to work and develop their business idea. They also had the support of the European funds.



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Case study 3 – ColorADD, Portugal³⁰

Name of organisation: ColorADD (<http://www.coloradd.net/index.asp>)

Sector of activity: color-coding system for colour blind

Year founded: 2010

Brief description about the social project

According to information collected on the ColorAdd website, the idea of the project was to “help alleviate the problem of a significant universe of the world population in an area where all societies are and are increasingly involved and concerned - Inclusion. ColorADD is a unique, universal, inclusive and non-discriminative language that enables the colour-blind to identify colours, with a wide infinite spectrum of use on companies/entities whenever colour is a factor of identification, orientation or choice. It is estimated that 350 million people (about 10% of the male population worldwide) are Colour-blind. The ColorADD code is based on three graphic symbols representing the three primary colours. Through the acquired knowledge of the “Colour Addition Theory” taught in the early scholar years, the symbols can be related and the entire colour pallet graphically identified. Black and White appear to indicate dark and light tones. Symbols that include colours, becomes "a mental game" easy to memorize and apply in daily.”

Aims and goals to be achieved

Its mission is to “contribute to the inclusion and improvement of the quality of life of citizens with difficulties in colour interpretation, especially colour blindness. It is intended that society in general see in this project a contribution to improve the satisfaction and well-being of a group of individuals who, because of their disabilities, are deprived of independence, security and tranquillity, in every act where colour is a determining factor of orientation, identification or choice”.

What has been done so far

ColorADD is for everyone “each and every implementation is for everyone not specifically towards colour-blind”. ColorADD allows “integration while keep the privacy of colour-blind - including without discriminating. ColorADD creates added economic and social value to companies or entities that use the code, by offering to their consumers an innovative product with a strong social footprint. ColorADD is already implemented in several areas such as Clothing, Textiles and Shoes (labelling and catalogues), Pencils, Textbooks Publishers, Transports (Subway maps), City Administration (e.g. Maps, Signage, Accessibility, Selective Garbage, Schools), Health (Accessibility and pharmaceutical labelling), Food Retailers (Traffic

³⁰ <http://www.coloradd.net/>



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light nutrition label), Photo luminescent Safety Signs, Didactic Games, Solid Waste Industry, General Industry (Products and Catalogues), Information Technology (APP, Colour WEB Picker) among others, achieving expertise through strong partnerships and creating replicable clusters fundamental to deploy the code, cross sector at a global scale. Education is a strategic activity of their mission and consequently is included the Pro-Bono Licensing System. The Code became an integral part of Schools Communities, an unequivocally tool at the service of Teachers and Students, objectified in a protocol signed with the Portuguese Ministry of Education and Science, establishing a social responsible example to the World”.

United Kingdom

Case Study 1- Rubisco

Name: Rubisco

Website: <https://www.rubisco.org.uk>

Year founded: 2017

Number of Employees: 8

Sector: Mentoring and Support

Brief description about the social project

Young people’s mental health is becoming more recognized as an area which demands better support & services. Good mental well-being is vital in enabling a young person to attain their greatest potential & achieve their dreams. As an organisation Rubisco aims to build a community of young people supporting each other grow to reach their potential.

Aims and goals to be achieved

Rubisco’s primary social goals are to empower and enable young people to reach their full potential, by providing mental health support. Their employees/volunteers are also students, who through working as mentors with Rubisco can also develop their skills in this area, making them not only more employable, but simply more well-rounded people.

What has been done so far

Rubisco have a programme in place, of one year of personal development, aimed at empowering, supporting, mentoring and encouraging young individuals who require mental health support. These young individuals are paired with a student mentor, who provide workshops, skills development sessions and generally help build their personal profile.



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What are the expected results

While Rubsico cannot disclose the personal stories of those that they have worked with, they hope that their mentoring can truly positively impact people's lives, this could be helping them stay in education or even helping them gain employment. Their aims for the future are surely to expand their programme and the services they offer, impacting more and more people.

How were the results achieved

Through the programmes and mentoring services delivered by the students

Main obstacles and difficulties

As a student social enterprise, one of the biggest issues for Rubisco is funding and creating financial viability and sustainability. Also, their scale (only 8 employees) makes their impact quite limited, as this is both the management team **and** the staff who work with their beneficiaries

Lessons learned

Three pieces of advice that would be helpful to people at the beginning of their journey running a social enterprise. If help needed, what type of help would this be?

Rubisco gave 4 pieces of advice, valuable to running a social enterprise, they are:

- Having clear values and ethos (being morally sound)
- A clear vision of what you intend to do
- A financial forecast and plan early on
- A continual evaluation of the social impact that is being made

Case Study 2 - KEFW Leadership programme

Name: KEFW Leadership programme

Year founded: 2012

Sector: Education and Training

Number of employees: Technically 150, around 30-40 **working** at a time (the others were **in training**)

Brief description about the social project

By utilising the skills of intellectual teenage children, a social enterprise was created to help facilitate the improvement of their employability skills and provide these students with work



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experience that they otherwise struggled to get. These students from high school, would deliver a 'Saturday and Summer School' programme for **primary school** children in the areas of English, Maths, Science, Problem Solving, Leadership, Music, Drama, Art and Sport, thus utilising their academic strengths in order to gain income and experience.

The benefit of this project was twofold as it also focused its work on working with **primary school children** from particularly deprived areas, this was ensured by offering prices much lower than the rest of the market for the service (£40 for 10 hours of schooling). The sessions could also have a tailor-made aspect, with the younger children being provided 1-to-1 coaching at time if they were struggling in particular areas. For children already invested and enjoying a subject these could be a time to further embrace their interests, for children struggling with a subject, they could approach it in a more innovative and dynamic way, learning with older children and breaking down the typical barriers that a conventional classroom can create.

The social enterprise was entirely **student-led**, from the planning of the teaching sessions to the delivery of the Saturday and Summer schools, students would lead in every aspect. There was also an internal training course for the high school students to ensure a high level of quality and delivery of the programme.

Aims and goals to be achieved

To make **high school** students more employable – teaching them about leadership skills, entrepreneurial skills, giving them the chance to earn an income, and have experience in running a social enterprise

To provide **primary school** students with a fun and educational day-care service, that is highly focused on increasing their attainment and enjoyment of the subjects they study at school, in turn this provides them with more opportunities and broadens their ideas on the educational system

What has been done so far

The project has impacted hundreds of students, who have now had work experience and experience being involved in a social enterprise. On the other side thousands of children have attended the Saturday schools and summer camps that have been delivered.

Each year there is a consistent timetable of these Saturdays, which run on every available Saturday in the academic calendar. There are 4 Summer Camps during the Summer and also at least 2 sports camps run during the year.



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What are the expected results

The aims for the future are to continue impacting students and children from both sides of the project. Now the project has expanded from just one **high school**, with students also providing a travelling Saturday school, reaching other areas of the city, other high schools have also shown an interest in franchising this model.

The project aims to continually improve the work that they do, ensuring they can keep their service at a very high standard.

How were the results achieved

Through the methods above

Main obstacles and difficulties

To begin with, in the early years (2012-2014) the project struggled to gain a sustainable workforce of students, this is because it had little history and promotion. Also, very few students had actually had significant training (the training for this project is usually about 2-3 years) to be a part of the social enterprise and deliver the services.

Lessons learned

- It is important to start somewhere, don't be afraid of small numbers, or even making a loss in your first attempts – everyone needs to start somewhere, and build from there
- Review and improve the work your organisation is doing, constantly
- Ensure you have a very good relationship and understanding of those you are delivering your service to

Case Study 3 - Ty-Ni (Our House)

Name: Ty-Ni (Our House)

Year founded: 2017

Number of employees: 5

Sector Activity: Energy

Brief description about the social project

Ty-Ni is a project focused on tackling the social issue of **energy/fuel poverty**. In the UK energy poverty is defined as spending over 10% of your income on energy and utilities, hopefully in



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addressing this issue Ty-Ni can ensure that the people they work with are both more environmentally friendly and can also live a happier, more enriched life, with less financial burdens and constraints. Currently 4 million homes in the UK are in fuel poverty (6% of the population), there is a fuel poverty gap of £354 in each household.

The idea, was to tackle this issue, the business that has been created as a result is a series of 'boxes' that are designed to reduce the amount of energy used in a household. The box contains items like LED bulbs, insulation equipment and other devices that can be installed around the house to reduce the energy output. These boxes come in a range of sizes and prices and can also be bespoke depending on a house-hold's needs.

Aims and goals to be achieved

To combat **energy/fuel poverty**, firstly in Wales, then expanding to the UK (and potentially the world). To begin with Ty-Ni will work in the local area, selling their boxes to those that buy them and providing subsidised services to those that may be more in need than others. There is also an educational division of Ty-Ni that will work in schools, educating the youth about the importance of energy efficiency, for both themselves and the environment.

What has been done so far

Currently Ty-Ni is developing its website and has produced some pilot boxes. They are now installing their equipment into a case-study house before bringing their boxes to the market, the case study house is necessary to prove the effectiveness that their work can have (this service to the case study house is being provided free of charge).

What are the expected results

Ty-Ni can be used in **any** household that would like to save on their energy bill, therefore they can hopefully make a sustainable income to fund the more social side of the work that they do. In the future the aim is to impact as many households as possible in Britain, through their boxes and the education service they provide.

In the future Ty-Ni also hopes to have 'Energy Heroes' in local areas, who can help those who may struggle to fit the boxes that they purchase. These Energy Heroes would also be paid on a commission basis for the boxes that they sell, thus providing an income.

How were the results achieved

through the methods above



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Main obstacles and difficulties

Ty-Ni's biggest issue is needing a fairly large amount of money before a lot of this can be achieved, luckily they have already received some grant funding and being backed by Enactus UK, means they have access to sponsors such as Wilmott Dixon (a large infrastructure company) and Wilkos (a retailer selling appliances and household items), who can aid them with both resources and coaching.

Lessons learned

- Maintain a clear vision of what your enterprise intends to achieve
- Think about sustainable solutions to your goals (e.g. the Educational aspect of Ty-Ni is a recent addition, previously the project was focused on the boxes, however the education means that in the long-term, their goal can be addressed)
- A strong network is very important, try to establish connections early

The Netherlands

Examples of successful Dutch social entrepreneurship projects:

- Tony's Choclonely - case study 1
- Dopper - case study 2

Case study 1: Tony's Choclonely

Year founded: 2005

Number of employees: 63

Head office(s): Amsterdam (NL) & Portland (USA)

Website: <https://tonyschoclonely.com/us/en>



Description about the social project

Tony's Choclonely strives for a 100% slave-free chocolate industry. That is the reason why this company is created. The company was founded by Tony (English equivalent of the Dutch name Teun). When he discovered that (child) slaves were being used on cocoa plantations in West Africa he tried to discuss the problem with large chocolate makers they completely ignored him. He created a 100% slave-free chocolate brand to prove that it could be done. And because he



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felt like he was the only guy in the chocolate industry that cared about eradicating slavery from the industry, he named his chocolate “Chocolonely”.

Aims and goals to be achieved

Mission: together we make 100% slave free the norm in chocolate.

Their recipe for slave free cocoa is based on 5 sourcing principles (traceable beans, a higher price, strong farmers, the long term, higher quality and productivity). They believe that all chocolate companies should apply these principles to their relationship with cocoa farmers.

What has been done so far

Tony shows that chocolate can be made differently, without slavery and exploitation. They have developed their own recipe for slave free cocoa with five ingredients. It enables the farmers to make a decent living. It also ensures that we know exactly where our beans come from and allows us to work with the farmers to eliminate the abuses in the industry.

They have created awareness under cocoa farmers and people in cocoa communities.

Everybody in their supply chain is happy with their chocolate; from the farmer and his children to the consumer who buys the chocolate. They lead by example to show the world chocolate can be made differently. Now they want to inspire other key players to take action and are actively seeking partners who would be interested in applying their model.

Tony is selling their chocolate in The Netherlands, Belgium, Sweden and the USA and be entering the Finnish, Norwegian and German market shortly. The US is home to three of the five largest players. Together, they control more than 35% of the worldwide chocolate market. Tony wants to make an impact in the USA. They have been selling their bars in the US for over two years now. Things are going well in the US but selling products is not the same as creating awareness. One of their priorities is that they need to spend more time and energy on marketing in the US.

Expected results /aims for the future

100% slave free the norm in chocolate.

How were the results achieved

See the above sections.

Main obstacles and difficulties

Creating awareness.



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Lessons learned

- Always being open for a good conversation;
- Be very critical of your own efforts and challenge yourself to find ways to have more impact;
- Be happy to follow good examples set by others.

Case study 2: Dopper

Year founded: 2010

Number of employees: 27

Head office(s): Haarlem (NL)

Website: <https://dopper.com/>



Description about the social project

Dopper's mission is to achieve a world in which people are conscious of the environment we live in, where the amount of single-use plastic is reduced and where everyone, near and far, has access to safe drinking water. Dopper has developed the perfect reusable water bottle; durable, beautiful and incredible easy to clean. You'll immediately reduce plastic waste, because you'll never need a single-use water bottle again but just use water from the tap. The Dopper is real Dutch design, produced with a net zero carbon footprint, free of BPA and contributes to drinking water projects in Nepal.

Aims and goals to be achieved

- Creating awareness regarding the impact of single-use plastic waste and inspiring people to initiate a change;
- Offering an innovative product line of sustainable design bottles for drinking water;
- Increasing access to safe drinking water for people around the world.

What has been done so far

In 2016, as many as 1,807,256 people in more than 25 countries turned the tide of plastic pollution by purchasing a Dopper and refilling it with tap water. According to their calculations that means a saving of 72,290,240 disposable bottles.

They sold the bottles in their own virtual store and via the 12,927 retailers countries including the Netherlands, Belgium, USA, Germany, France and Brazil. They have also set foot in Germany, Belgium and America where they are attempting to tackle the polluting PET bottle.

Expected results /aims for the future

- New colours for the bottles;



- Work closely together with influential partners such as The Ocean Cleanup;
- Seek global attention for the plastic problem;
- The Dopper Foundation will provide access to clean drinking water for 10,000 Nepalese people over the next years and will investigate what other solutions and changemakers the Foundation can invest in.

How were the results achieved

See the above sections.

Main obstacles and difficulties³¹

Dopper almost went bankrupt. They had to change their whole business model in order to prevent this from happening. Instead of permanent staff, they now work locally with ambassadors abroad. They are employed by Dopper, but they actually work as a freelancer without a permanent office. They carry out the vision, explore the opportunities in the local market and prepare partnerships with, for example, retailers. As soon as a market grows locally, Dopper can hire an extra ambassador. Additional financial buffers have been built into the new business model. Cash flow is 'key'. They focus much more on that than on turnover. The company was growing too hard which was a problem. Now they are doubling in growth each year; more is dangerous and leads to less control.

Lessons learned³²

- Feel happy as a (social) entrepreneur;
- Do the things you are good at and outsource the things you are less good at;
- Learn to look at your company from a distance.

Case study 3: PYMWYMIC

Year founded: 1994

Number of employees: 12

Head office(s): Amsterdam (NL)

Website: <https://www.pymwymic.com/>

pymwymic

Description about the social project

The purpose is to help fund companies who make a positive impact on the planet, or the people. Together, as a community, this purpose is both meaningful, and fun. So they also connect

³¹ <https://www.mt.nl/dossiers/gamechangers/merijn-everaarts-dopper-alle-pet-flessen-uit-de-supermarkt/88502>

³² <https://www.sprout.nl/artikel/growth-talks/hoer-merijn-everaarts-dopper-zijn-ondernemersgeluk-hervond>



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through gatherings, and share ideas and experiences with new investors. They are an inclusive members organisation: European at heart; cross-generational; active and interested; united around common values. They are an investors' community of families, individuals and foundations who have made the commitment to 'put your money where meaning is' and share experience, education and deals in order to grow the momentum of impact. They offer multiple entry points to become part of the community.

Aims and goals to be achieved



What has been done so far

Over the last two decades, they have together invested many millions, helped over 60 companies with significant seed or growth funding, and supported many more hundreds of entrepreneurs through belief, support and connections.

Expected results /aims for the future

In 2016 they launched the Pymwymic Impact Cooperative. This is the first-ever peer-to-peer impact holding company, welcoming mission-aligned families and individual investors as shareholders. With the creation of the Pymwymic Impact Investing Cooperative, they intend to guide family-led European impact leadership into the next generation and move sectors forward.



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The Pymwymic Impact Coop is the investment arm, and part of a larger Pymwymic ecosystem that includes the Field Building Center, and a Donor Fund. The Motto is “Learn, Share, Invest”.

How were the results achieved

See the above sections.

Main obstacles and difficulties

The founders put their own money into each Pymwymic portfolio investment and, supported by a small team, continue to scout and screen impact investing deals.

Lessons learned³³

- Do not use your social entrepreneurship project as a marketing trick;
- Do not ignore the business side of your social enterprise. Social entrepreneurs are usually extremely enthusiastic and involved, but often ignore the business side;
- Especially small companies are suitable for social entrepreneurship. They are much more innovative, faster and more flexible than large companies. They can also respond much faster to the market opportunities that arise.

³³ <https://www.sprout.nl/artikel/rondetafel-%E2%80%98je-wel-moet-een-beetje-idealist-zijn%E2%80%99>



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Results of the Questionnaire

This questionnaire was addressed to future entrepreneurs, experienced entrepreneurs, adult educators' providers, experts and other stakeholders in each participant country aiming to identify the key elements to be addressed in the ETC.4SE Curriculum and Toolbox to promote entrepreneurial culture and successful development of social entrepreneurship projects through open digital tools. The questionnaire aimed also to help the consortium to understand the training needs of future entrepreneurs. The consortium collected 101 responses in total (all countries).

Relevance of the topics in a training curriculum and toolbox aiming to promote and support the development of successful social entrepreneurship projects.

The majority of the participants considered that all topics are relevant, however, some participants think that Digital Innovation might not be as relevant as the other topics. The topics were:

- Design Thinking
- Digital Innovation
- From the mind to the market
- Start-Up Business Plan
- Legislation
- Marketing
- Digital Marketing
- Communication
- Source of finance
- Finances – cash flow
- Sales

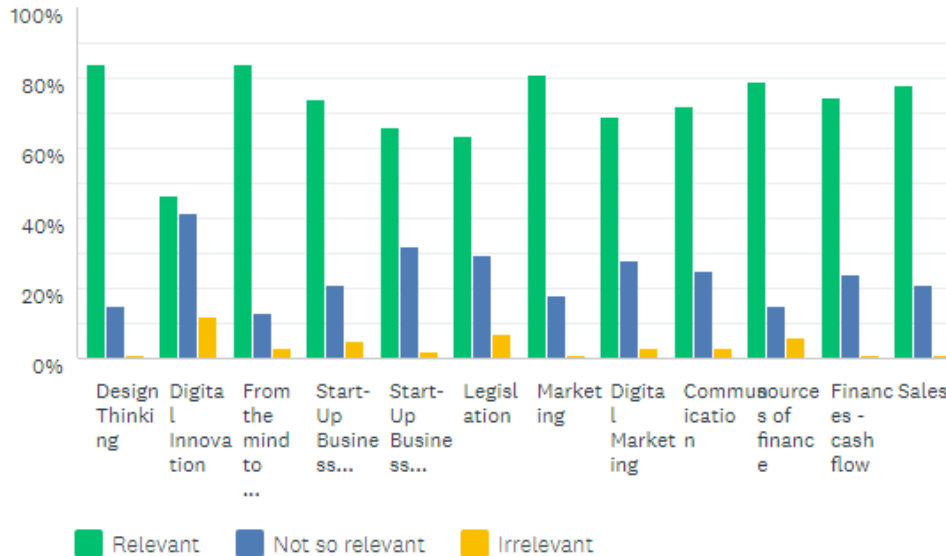


Figure 1

Some suggestions for additional topics were:

- ✓ Recruitment - how to “select” your potential associates & co-workers.
- ✓ Soft skills such as communication, motivation, negotiation, coaching etc.
- ✓ Persistence: one needs stamina to persist and keep going, no matter what the obstacles are.
- ✓ How to find associates, consultants and supporter who can complement the skills one does to have” at home”.
- ✓ Storytelling – every business needs powerful storytelling to grow.
- ✓ Networking skills - creating or entering in a network in relevant sector of entrepreneur in start-up term.
- ✓ Leadership - understanding copyrights and IP
- ✓ A mindset of testing your idea in the market, with your potential users fast, and the skills to do it. Avoid the trap of seeking perfection or over complexity early on
- ✓ Recognising a "Pain Point" and understanding a target customers' wants and needs!
Vital Creating a team who will convince investors to invest in them.
- ✓ Customer Relation Management and Digital Entrepreneurship (Not only the new mentioned above - but how to digitize and digitally support business processes and collaboration/communication



- ✓ Manufacturing processes - human and material resources needs, production system design
- ✓ Entrepreneurial soft skills: confidence, initiative, public speaking, opportunity spotting, adaptability
- ✓ Operating with values and ethics
- ✓ Networking, getting into contact with the right persons/companies/organisations that are relevant for your business
- ✓ Intellectual Property Management
- ✓ Cooperation skills
- ✓ Measurement of social impact

The main barriers for setting up a business

Finance was pointed out as the main difficulty faced for setting up a business (68.37% followed by support and network (48.98%), skills (45.92%) and knowledge (41.84%).

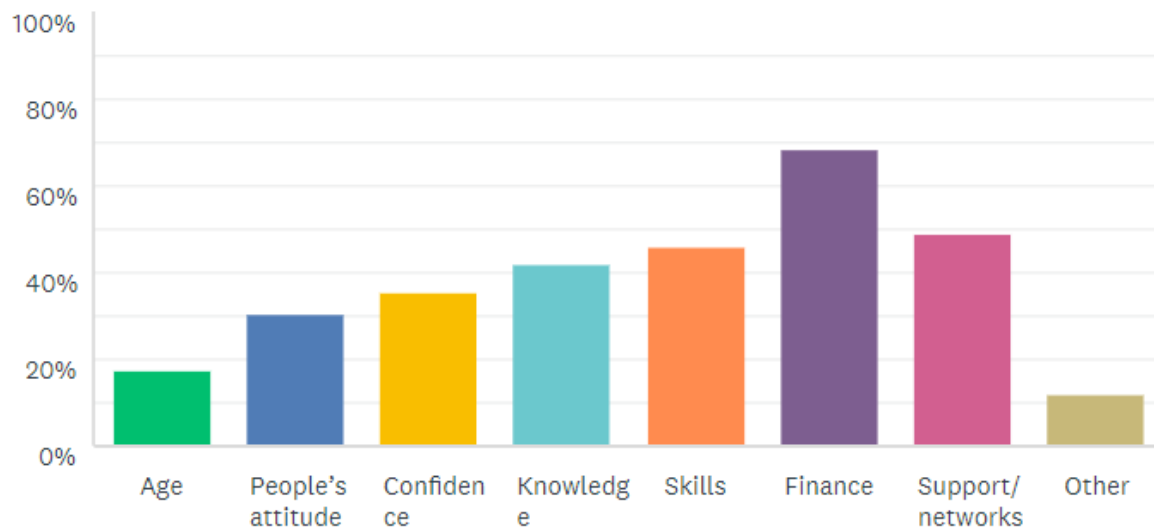


Figure 2

Others barriers

- ✓ Family
- ✓ Access to finance
- ✓ Network



- ✓ Persuading inventors and creators to become customer oriented
- ✓ Geographical issues, state stability, lack of infrastructures
- ✓ Bureaucracy, Legislation
- ✓ Understanding the market
- ✓ Bureaucracy and lack of interest to the valorisation of the Greek and Roman heritage of the EU

To the question of **whether they had ever created a business:**

53.13% of the participants said yes and 46.88% said no.

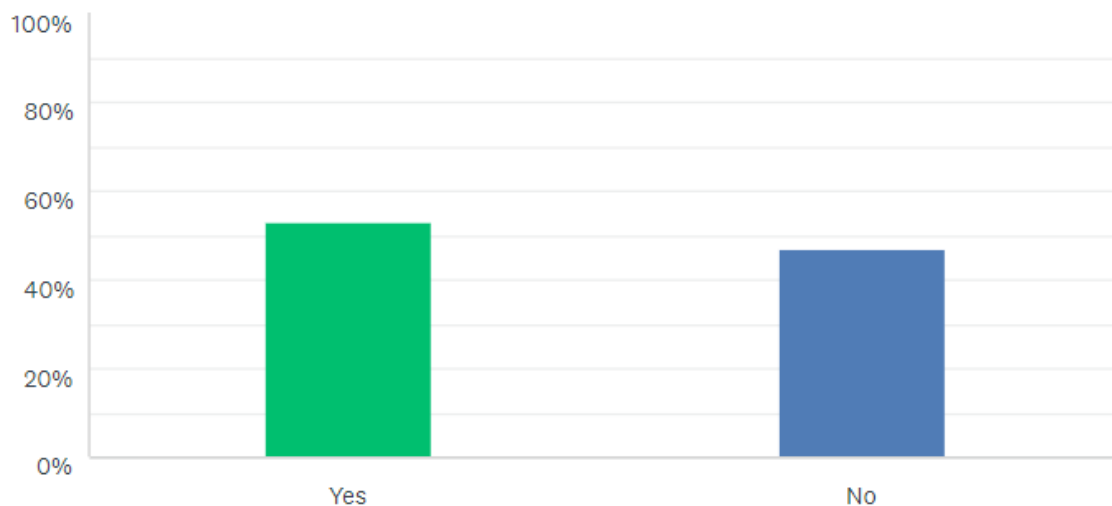


Figure 3

Participants who are/were entrepreneurs said that their primary motivations into becoming an entrepreneur and beginning own business were:

- ✓ Creativity: doing things in my own way and effective time management
- ✓ To be able to do more for the environment
- ✓ To apply my knowledge about a specific topic/an and to have extra income in addition to my main job
- ✓ To make my dreams come true. To drive ideas which are beyond the established social framework of doing things.
- ✓ To make my dream true and create a company supporting others and creating a second family.



- ✓ Confidence on myself
- ✓ To be independent, increasing income, being visible in society and social responsibility
- ✓ I have lost my job and saw myself confident and capable to do my own business. I'm now a supplier to my previous company
- ✓ My primary motivation was making a living doing what I could do, based on my experience and knowledge
- ✓ Interesting issues and questions from coming costumers.
- ✓ as a personal challenge: to build a business with my own vision regarding team interactions and CSR
- ✓ Quitting a job in a multi-national company and needing to feed and house my family.
- ✓ Control my destiny
- ✓ Be able to help others
- ✓ I wanted to start - I wanted to be independent - I saw an opportunity to use my skills and experiences to get a more interesting life than to be employed
- ✓ Nothing yet for making my business!
- ✓ To Bring better value in the same sector for clients
- ✓ passion for new challenges and family tradition in the sector
- ✓ Solving a problem and making money.
- ✓ Experience of running a business, and being your own boss
- ✓ To fill a gap in the market
- ✓ freedom and choice
- ✓ I wanted to become my own boss.
- ✓ I wanted to make a difference in the world.
- ✓ Doing something I'm passionate about
- ✓ Generating revenue
- ✓ I was not content with the way we worked at the company I was working, so therefore I started my own company so I could decide how to work by myself.
- ✓ Braking social stereotypes, giving job opportunities to individuals from vulnerable social groups
- ✓ support other businesses
- ✓ Creating my own business trying to implement my ideas
- ✓ exploiting my skills to other economic areas

Identifying one thing that makes a business idea a 'good' one

- ✓ Passion to support it and giving a real solution to a challenge
- ✓ Be sure that there is a market for it. Without a market there are no sales and hence no income.



- ✓ That the entrepreneur really believed in it. The understanding that an existing market must be there is a misconception. Many innovations had no market when they were first conceived as ideas.
- ✓ To create something is needed in the market.
- ✓ The impact on the market expectation
- ✓ Address a real need, solve a real problem.
- ✓ To provide the necessary cash flow while meeting the needs of the beneficiaries.
- ✓ It should have potential on growing and substantiality
- ✓ A business idea for a product/service that is disruptive (it will be a trend and thus create a new market) or responsive (responds suitably to a given market need)
- ✓ Unique value propositions - the capability of the founder to deliver it all
- ✓ The capacity to connect with customers' real needs
- ✓ That it is something someone is asking for or so new that no-one knows its existence. (Skype, Spotify etc.)
- ✓ It's a good idea if you have customers interested in paying for your products or services, and if you can provide them in a way that your business is sustainable, i.e., it has the potential to grow
- ✓ Strategic and operational marketing plan: customers and clients are the main economic source of every business
- ✓ It solves other peoples' or organisations' "pain points" at a profit.

Knowledge or experience using the following digital tools

The majority of the participants have already heard or used the digital tools listed (E-learning training, online platform, mobile apps, online interactive tools).



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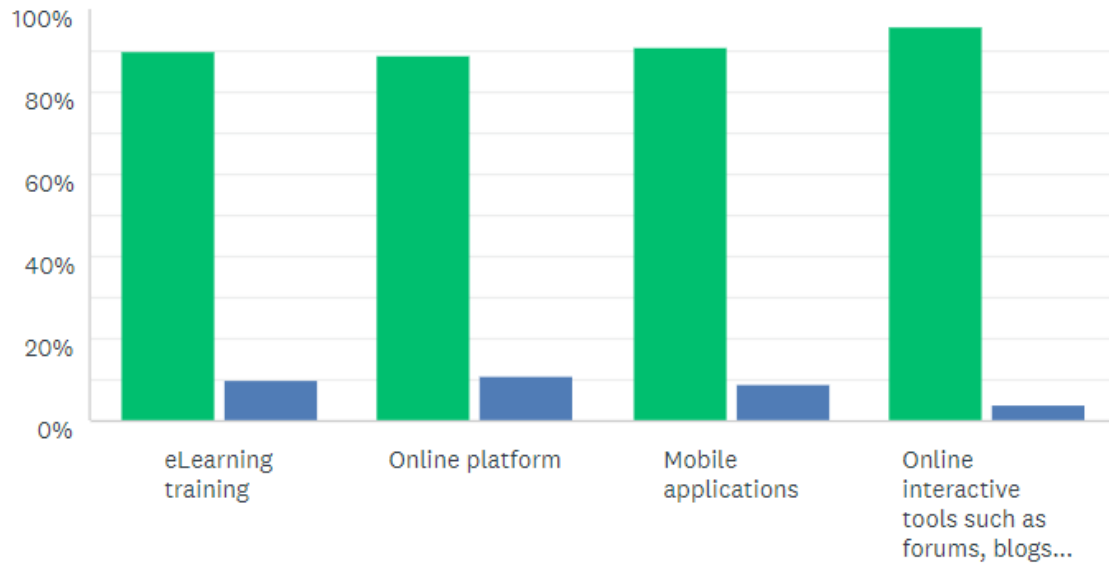


Figure 4



Conclusions

Based on the management model implemented in the social economy sector, the project focuses on the work for the improvement of certain generic skills, such as active entrepreneurship, critical thinking and digital competences, using the theoretical bases of social economy to work the collaborative spirit, and inclusive entrepreneurial thinking.

In this sense and aiming to provide an effective and practical business tool for both trainers and learners the consortium will start now working in the development of the online training course that will consist of didactic units and a simulation tool of business practices using the adapted Bridge Model technique.

The business simulator is intended to provide learners with practical knowledge in order to have a first approach to the business realities. The ETC.4SE business simulator has the added value provided by the adaptation of the Bridge Model technique, by which it is possible to guide learners through the process of creating a social enterprise through an interactive tool composed of different phases: the users will be entering data on the business he/she wants to develop and will receive feedback with ideas and information on successful practices implemented by other social entrepreneurs.

Based on the research carried out the training course should be divided in **theoretical contents** and **practical tools**. The contents to be developed should focus both on Soft skills and technical skills:

- **Softs Skills (basic skills to become an entrepreneur)**
 - Communication
 - Creativity
 - Leadership
 - Problem solving
 - Making decisions
 - Time management
 - Design Thinking
 - Etc.
- **Technical skills (key-steps to the development of a business idea and setting up a start-up project/business)**



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- Digital Innovation
- Development of a business idea
- Start-Up Business Plan
- Presenting a business plan (business pitch)
- Storytelling
- Legislation
- Marketing and Digital Marketing
- Networking
- Finances Needs (source of finance, cash flow, etc)
- Promotion and Sales

The practical tools should be focused on the Bridge Model to set up different stages that an entrepreneur need to go through in order to prepare a start-up business focus on social issues.



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- c) http://ec.europa.eu/eurostat/tgm/refreshTableAction.do?tab=table&plugin=1&pcode=tein_a225&language=en

Economy primary sector (%)

- a) <http://www.broadway-academy.co.uk/wp-content/uploads/2013/03/Birmingham-Revision-Guide.pdf>
- b) http://catalogue.pearsoned.co.uk/assets/hip/gb/hip_gb_pearsonhighered/samplechapter/0273736906.pdf
- c) http://ec.europa.eu/agriculture/statistics/rural-development/2013/full-text_en.pdf

Economy secondary sector (%)

- a) <http://www.broadway-academy.co.uk/wp-content/uploads/2013/03/Birmingham-Revision-Guide.pdf>
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- c) http://ec.europa.eu/agriculture/statistics/rural-development/2013/full-text_en.pdf

Economy tertiary sector (%)

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- b) <http://www.tradingeconomics.com/united-kingdom/gdp-per-capita>
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- c) <http://www.dw.de/eu-laments-lingering-illiteracy/a-16224839>

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- b) <http://www.ons.gov.uk/ons/guide-method/compendiums/compendium-of-uk-statistics/population-and-migration/index.html>
- c) <http://www.worldpopulationstatistics.com/population-of-europe-2014/>

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- a) http://www.ons.gov.uk/ons/dcp171776_337841.pdf
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Unemployment

- a) <http://www.birmingham.gov.uk/birminghameconomy>
- b) Same as above
- c) http://ec.europa.eu/eurostat/statistics-explained/index.php/Unemployment_statistics

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- a) <http://www.ons.gov.uk/ons/rel/lmac/underemployed-workers-in-the-uk/2014/rpt-underemployment-and-overemployment-2014.html#tab-Underemployment>
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Unqualified (%)

- a) http://en.wikipedia.org/wiki/Economy_of_Birmingham#Employment
- b) http://www.ons.gov.uk/ons/dcp171776_337841.pdf

University degrees (%)

- a) <http://en.wikipedia.org/wiki/Birmingham>
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