



## **SERI's 100 Leaders - Survey Insights (2026)**

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## **1. Executive Summary**

The 100 Leaders Survey gathered voices from across Ireland's social enterprise ecosystem, and a number of recurring themes emerge strongly from the data. Respondents suggest that access to co-funding, trading supports and staff capacity continue to constrain growth. These themes will be brought to the full 100 Leaders group for exploration and debate.

Seventy leaders from across the ecosystem responded to the survey, representing social enterprises, support organisations, buyers and others. The findings highlight alignment across groups on the need for:

- More accessible and appropriate finance/co-funding
- Simplified and more intentional public procurement
- Stronger leadership and organisational capacity

Encouragingly, there is also a strong appetite for collaboration through the 100 Leaders Initiative's next phase, with many respondents willing to participate in working groups.

The evidence gathered provides a useful starting point for the conversations ahead, ahead of the next National Social Enterprise Policy. The 100 Leaders Forum will be an important opportunity to test, challenge and build on these initial findings.

## **2. Response Profile**

Total respondents: 70 (70% of the 100 Leaders cohort)

### **Respondent categories**

- Social enterprises: 34 respondents (49%)
- Support organisations: 29 respondents (41%)
- Social procurers/buyers: 2 respondents (3%)
- Other/mixed roles: 5 respondents (7%)

The strong representation from both delivery organisations and support bodies provides a balanced system-level perspective, although buyer participation was limited.

### 3. Most Pressing Challenges and Strategic Themes

#### 3.1 Core challenges facing social enterprises

Among social enterprise respondents, the most significant barriers were highly concentrated:

- 76% cited limited access to funding or investment
- 29% cited insufficient leadership or management capacity
- 29% cited difficulty attracting or retaining skilled staff
- 26% cited lack of strategic partnerships or networks
- 26% cited limited trading opportunities or customer base

This indicates that working capital access and organisational capacity are significant concerns for many respondents — though the picture is unlikely to be uniform across the sector, and the 100 Leaders will be an important place to explore the diversity of experience.

*“A working capital fund is the quickest and most effective way to support social enterprises to scale. We need investment in BD/Sales roles to help win contracts and generate more income.”*

*“Biggest challenge resourcing a skilled team at senior level.”*

*“Reduce the cost of employment, PRSI reductions, incentivise the sector to employ mid to senior tier employees to help the team in depth and breadth.”*

These perspectives point to a combination of financial and human resource pressures - though the relative weight of these factors, and how they interact, is likely to vary significantly across different types and stages of social enterprise. The 100 Leaders offers an opportunity to explore the nuances behind these headline figures.

#### Illustrative respondent voice:

*“Limited access to funding or investment” (multiple respondents)*

*“Biggest challenge resourcing a skilled team at senior level.”*

### 3.2 Support priorities identified by social enterprises

When asked what would most help them deliver impact in the next 12 months:

- 74% prioritised access to finance or fundraising support
- 35% prioritised policy advocacy or sector representation
- 32% prioritised staff or board development
- 29% prioritised peer learning and networking
- 26% prioritised digital/technology support
- 26% prioritised impact measurement training

The data points to finance and capability as recurring priorities - though how these should be sequenced, and what forms are most useful at different stages of development, is likely to vary. This will be a valuable discussion for the 100 Leaders.

*“Access to finance or fundraising support”*

*“We need to help [social entrepreneurs] to be better able to tell their full story. We also need to be able to better tell the stories of impact of the work of support organisations and why they matter in the success of social enterprises.”*

Peer learning and networking also featured prominently, with respondents pointing to the value of connecting with others navigating similar challenges. Whether the balance between financial and capability supports is right - and what capacity-building should look like in practice - are questions worth bringing to the full group.

### 3.3 Cross-system themes

Across all respondent types, several consistent themes emerged:

*Fragmented supports*

Respondents repeatedly noted that supports are ‘piecemeal’ and difficult to navigate.

*“Greater overview by Govt. as to how it supports the sector which is currently piecemeal and scattered.”*

*“SICAP needs to be looked at, as that money for community is not reaching the ground, there are very little government supports reaching social enterprises.”*

*“There is a tension within the community and voluntary sector on the role and definition of social enterprise and its fit within the sector and this needs to be addressed.”*

#### Procurement barriers

There is strong appetite to grow social procurement but processes remain complex and risk-averse.

#### Capacity constraints

Many social enterprises report being overstretched operationally, particularly at senior leadership level.

#### Regulatory and administrative burden

Reporting requirements and programme rules were frequently cited as disproportionate.

*“Excessively onerous reporting demands...”*

#### Impact measurement challenges

Time, resources and lack of shared frameworks continue to limit effective impact measurement.

## **4. Stakeholder Perspectives**

This section highlights areas where further exploration is required across stakeholder groups:

### **4.1 Social enterprises**

Responses suggest a combination of financial constraints and capability challenges, though the relative weight and interaction between these factors is likely to differ across organisations. Some illustrative perspectives on what success would look like for respondents:

*“If the 100 Leaders initiative succeeded beyond expectations, in 2–3 years we would be operating in a far more enabling environment. Social enterprises like ours would have clearer, fairer access to funding regardless of legal form, and fewer structural barriers to scaling proven programmes.”*

*“Success would mean spending less time overcoming avoidable obstacles and more time delivering measurable social impact at scale.”*

Questions the 100 Leaders may wish to explore include:

- To what extent does access to finance depend on organisational readiness?
- How do funding structures influence enterprise behaviour and growth trajectories?
- What types of support are most effective at different stages of development?

#### **4.2 Support organisations**

Support bodies raise questions of coordination, consistency and system clarity. Some respondents also offered candid observations about the support system itself:

*“Support organisations need to start putting the SEs front and centre and not their own organisations — mammoth task!!”*

*“There is a lot of noise across support groups, this initiative could help provide greater clarity and differentiation between support organisations so social enterprises are clearer about where to turn to.”*

Key questions for the 100 Leaders include:

- How can alignment be improved across agencies and programmes?
- What role should national-level coordination play, and how should it function?
- How can the pipeline of investment-ready enterprises be strengthened?

#### **4.3 Social procurers**

Buyer participation in the survey was limited, which makes it difficult to draw firm conclusions about procurement barriers from their side of the relationship. Some early perspectives were offered:

*“Sisk is motivated to buy from social enterprises because it enables us to deliver measurable social value alongside commercial outcomes. It aligns with our Sustainability Roadmap commitments, supports inclusive economic growth in the communities where we work, and helps us meet client and policy expectations.”*

*“On a like-for-like basis, businesses will, in my view, always choose a social enterprise over a not-for-profit. The key point though is that the SE must be competing on a like-for-like basis.”*

Questions worth exploring with buyers at the 100 Leaders include:

- What barriers exist within procurement systems from the buyer perspective
- How risk, compliance and value are currently interpreted
- What practical changes would enable greater participation of social enterprises

## **5. Early Areas of Opportunity**

Survey responses highlight a number of areas where progress may be possible in the near term. These will be considered by the 100 Leaders as areas for exploration or ‘quick wins’. Examples include:

### 1. Improve visibility and navigation of supports

- Create a single national ‘front door’ for social enterprise supports
- Map and publish available funding and programmes and identify funding gaps

*“Mapping... organisations willing to share publicly across a specific network...”*

### 2. Mobilise experienced social entrepreneurs

- Structured peer mentoring
- Leadership exchange programmes

*“Experienced social entrepreneurs being incentivised to help new social entrepreneurs...”*

### 3. Procurement signal from Government

- Clearer social value weighting
- Pilot reserved or targeted contracts and innovation procurement
- Buyer guidance and templates

### 4. Reduce administrative burden

Examples cited include:

- Community Services Programme displacement rule
- Inconsistent funding application and compliance criteria across departments

- Onerous reporting requirements

*“Universal criteria and scoring systems should be developed...”*

#### 5. Strengthen sector storytelling and social impact measurement/SROI

- National case studies
- Impact evidence pack
- Buyer-facing & funder-facing materials

### **6. Policy Implications for the Next National Social Enterprise Policy**

The survey responses point to several domains that may warrant consideration in the development of the next National Social Enterprise Policy. These are offered here as starting points for discussion rather than conclusions - the 100 Leaders will be an important opportunity to test whether these reflect the group’s shared priorities:

- Finance and funding architecture (‘Co-Funding’)
- Public procurement and market access (‘Trading Maximisation’)
- Leadership and organisational capacity (‘Resource Optimisation’)
- System coordination and governance (‘Coordination’)

At this stage, the emphasis is on building a shared understanding of how these domains interact, where misalignments may occur, and what conditions might support effective change. A number of respondents also raised broader questions about the initiative itself:

*“It remains a little unclear to me what the primary objective of the 100 Leaders Initiative. If it can help build collaborative networks, shared resources and expand visibility of the role of SEs then this will be a positive thing — but how that happens in practice is not yet clear.”*

*“I’m not sure what the end goal of the 100 Leaders initiative is. A very carefully vetted list of individuals who have proven, demonstrable expertise is key to building credibility.”*

These responses reflect a genuine openness among many Leaders to being involved in shaping the initiative’s direction - and perhaps also a healthy challenge to SERI to be clear about what it is trying to achieve. These questions will be central to the June 2026 in-person event.

## 7. Draft Conclusions (To Be Tested With The 100 Leaders)

The survey findings, taken together, suggest that two interconnected areas may be most deserving of focused attention in the next phase of work. These are offered here as draft working conclusions - not as settled positions. The purpose of naming them is to bring something concrete to the 100 Leaders Forum in June 2026 for challenge, refinement or rejection.

It is entirely possible that the Forum will reframe, reorder or add to what is set out below. The views of the 100 Leaders - heard collectively and in discussion - will be far more valuable than any conclusions that can be drawn from a survey alone.

### 7.1 Trading Maximisation

A recurring theme across the survey is that social enterprises have untapped trading potential, but face structural barriers that prevent them from realising it. The headline financial challenge - access to funding - may in part be a symptom of insufficient trading income rather than simply a grant deficit. Three sub-themes emerge:

#### *Access to social and innovation procurement*

- Public procurement remains one of the most frequently cited opportunities for social enterprises, yet the processes involved are widely experienced as complex, risk-averse and difficult to navigate. Several respondents identified specific mechanisms - such as reserved contracts, dynamic purchasing frameworks and social value weighting - as potential routes to greater market access.

*“The procurement process is too difficult to navigate and needs to look at dynamic purchasing frameworks and reserve contracts to increase tenders from social enterprise.”*

*“Public procurement shift to include mandatory requirement for proportional use of social impact in supply chain.”*

*“Social value would give points to social enterprises as main bidders without them having to do other work for points. Private sector should have to do that.”*

*Giving the key person time to work on trading maximisation rather than day-to-day firefighting*

- A persistent tension emerged between the ambition to grow traded income and the operational reality of running under-resourced organisations. Leaders consistently described being consumed by administration, reporting and compliance - leaving little capacity for business development, sales or strategic relationship-building. Some respondents suggested this is as significant a constraint as capital access.

*“A working capital fund is the quickest and most effective way to support social enterprises to scale. We need investment in BD/Sales roles to help win contracts and generate more income.”*

*“CEOs are often in the weeds and wearing many hats. Admin support can be seen as a luxury meaning leaders end up doing admin. It’s a major risk for the org.”*

*“Excessively onerous reporting demands from especially Enterprise Ireland.”*

#### *Limited access to business development supports for social enterprises*

- Social enterprises frequently fall outside the eligibility criteria for mainstream enterprise supports (such as those offered by Enterprise Ireland and Local Enterprise Offices), yet do not always fit neatly into the community and voluntary sector either. This leaves a gap in terms of business development, sales capability and strategic growth supports - precisely the areas needed to scale trading income.

*“There is often a tendency for social enterprises to ‘force-fit’ their applications to meet specific LEO grant eligibility requirements rather than applying for the support that truly aligns with their core mission.”*

*“Together we are stronger so speaking in one voice for formal EI-like supports for SEs.”*

*“Start-up tech or pharma enterprises get funding thrown at them — and to what benefit for society? Even a fraction of this would be hugely more impactful for society in Ireland.”*

Questions for the 100 Leaders: Is trading maximisation the right framing? What would genuinely unlock more trading income - procurement reform, business development capacity or something else? Where should the 100 Leaders focus their energy?

## 7.2 The Accessibility and Adequacy of Co-Funding

Alongside trading income, access to appropriate and accessible co-funding remains a critical issue. The survey suggests this is not simply a matter of ‘more funding’ - the structure, rules and focus of existing funding mechanisms may be as important as overall quantum. Four sub-themes emerged:

### *Issues with existing funding opportunities in Ireland*

- Beyond structural rules, respondents raised concerns about the design and administration of existing funding opportunities - including a perceived mismatch between funding priorities and the needs of social enterprises, burdensome application processes, fragmentation across government departments, and the annualised nature of most funding cycles.

*“There are a wide number of projects being repeatedly funded for the same thing and are never challenged to become self-sufficient. There are a wide number of projects being funded without a pilot having been tested, impact measurement practices in place or evidence that it can be sustainable post funding.”*

*“That the focus is on the needs of the social enterprise and the support programmes, both national and local, pool their resources to best meet these needs. This would completely remove the need for the social enterprise to apply to a plethora of different funds, spending time they do not have on various application forms.”*

*“As a CLG, many funding streams are open only to charities, meaning CLGs are often excluded from applying. A quick and effective solution would be to recognise CLGs as non-profits across all funding programmes and allow them to build reserves without being subject to corporation tax.”*

### *Displacement rules preventing access*

- The Community Services Programme displacement rule — which requires social enterprises to demonstrate they are not displacing another business — was specifically cited as a barrier that sits uneasily with the nature and purpose of social enterprise. Several respondents questioned whether this rule is appropriate in an environment where the social impact dimension is central to the organisation’s purpose.

*“The Community Services Programme requires that all social enterprises must show that they are not displacing another business. In light of the fact that 70% of staff employed must be from specialist target groups, alongside the restrictions SEs face if a charity, it is inappropriate now (with a SE Policy in place). The social impact dimension is not being factored into the organisation’s raison d’être.”*

#### *De minimis rules limiting the amount of co-funding*

- De minimis state aid rules limit the cumulative public funding that can be directed to a single organisation over a rolling three-year period. For social enterprises seeking to scale or undertake capital investment, these limits can become a significant ceiling — restricting the ambition of what is possible without access to commercial capital or private equity.

*“De minimis — but not sure how easy it can be changed.”*

*“Reduced bureaucracy — especially in procurement, tendering and de minimis regulations (exemptions should be sought).”*

#### *Lack of data on social enterprise impact / return on investment*

- A circular challenge emerged across the survey: social enterprises struggle to generate robust impact data because they lack the resources to measure impact, yet they cannot access larger funding streams without demonstrating impact. This “pilot trap” leaves many organisations reliant on small, short-term grants rather than being able to build the evidence base needed to unlock sustainable investment.

*“The big challenge is the restrictive funding models that prevent organisations from reaching the scale needed to generate robust impact data. Relying on small, short-term funding pots makes it nearly impossible*

*to reach the scale required to demonstrate ‘big numbers’, yet access to larger funding streams often depends on already having that evidence.*

*This creates a circular barrier where restrictive funding halts scale, and lack of scale halts impact measurement.”*

*“Often social entrepreneurs don’t have the time, capacity or knowledge to fully measure all of the multiple impacts they are having on their communities.”*

*“Funders don’t want to pay for staff.”*

Questions for the 100 Leaders: Are these the right sub-themes? Which of these barriers is most tractable in the short term? Is there appetite to develop a shared position on any of these issues - for example, a common ask to Government on displacement rules or de minimis thresholds?

These two areas - trading maximisation and the accessibility and adequacy of co-funding - are offered as draft working conclusions to carry into the 100 Leaders. They are grounded in the survey data, but they are not definitive. Other themes may emerge as more important when the full group comes together. The 100 Leaders’ collective intelligence and lived experience should be the primary guide.

To maintain momentum and build on the insights gathered, SERI is proposing the following process. This is offered as a starting framework for discussion at the In-Person Event in June - the 100 Leaders themselves will have a key role in shaping what happens next.

### **June 2026: 100 Leaders Forum (Dún Laoghaire)**

The next full meeting of the 100 Leaders group will focus on:

- Reflecting on the survey findings and the complexity they reveal
- Identifying the key questions that need to be explored in more detail
- Surfacing areas of misalignment and potential obstacles
- Commencing deeper examination of priority themes

This session will not seek to finalise solutions, but rather to build a shared understanding of the issues and define the agenda for the next phase of work. Respondents have offered some useful prompts for how the in-person event in June should approach this:

*“It would be helpful to know that people are listening to the 100 Leaders group and what it says. Is there evidence that it is swaying the departments’ thinking?”*

*“People are time poor — don’t feel under pressure to create engagement groups for the sake of it. Make them specific.”*

*“Match what people want to get out of it with what people can (and are willing to) bring to the initiative = success! You’ll know whether the right people are in the room.”*

### **July 2026 – April 2027: Thematic Workshops**

Thereafter, a series of thematic working groups will be established to examine key areas in depth.

These working groups will:

- Explore issues from multiple perspectives, including different stakeholder roles
- Examine both opportunities and constraints within the current system
- Test assumptions and surface differing viewpoints
- Encourage innovative and exploratory thinking
- Consider what might work in practice, including potential risks and trade-offs

Participants will be selected to ensure balance across:

- Social enterprises
- Support organisations
- Public sector actors
- Buyers and market participants

Each working group will be expected to produce a report back to the full 100 Leaders group. This will allow ideas to be shared, challenged and refined before any move towards adoption.

### **May 2027: Consolidation and Synthesis**

Outputs from the working groups will be brought together and reviewed collectively. This stage will focus on:

- Testing the robustness of emerging ideas
- Identifying areas of consensus and divergence
- Refining proposals based on group feedback

Only at this point will more formal recommendations be developed.

## 8. Appreciation

SERI extends sincere thanks to all 70 leaders who contributed their time, experience and insight to this survey. The quality and candour of responses demonstrate a strong collective commitment to strengthening Ireland's social enterprise ecosystem. Your engagement is directly shaping the focus, scope and ambition of the 100 Leaders Initiative. Thank you.

## 9. The 100 Leaders in Alphabetical Order (more to be added)

Full Name	Organisation
Agnes O'Shaughnessy	Rethink Ireland
Aidan Ó Gormáin	CRNI (Community Resources Network Ireland)
Aisling Moroney	Western Development Commission
Allan Mulrooney	Western Development Commission
Amanda Johnston	Social Enterprise NI
Anne Graham	Western Development Commission
Anne Stewart	Office Government Procurement
Anthony Burrowes	Sisk
Bairbre Nic Aongusa	Dept of Rural and Community Development and the Gaeltacht
Bernie Walsh	Sunflower recycling
Brendan Finn	Inner City Enterprise
Brendan Whelan	Social Enterprise Republic of Ireland (SERI)
Claire Downey	Rediscovery Centre
Clodagh O'Reilly	Social Enterprise Solutions Ireland
Colin McCabrey	InterTradeIreland
Colm Galvin	Living Woodlands Ecosystem Restoration
Damien Quinn	Spéire Nua
Danielle Carty	Social Enterprise Republic of Ireland (SERI)
Dara Connolly	Common Purpose
Darren Ryan	Onwards
David Graham	Terenure Enterprise Centre
Deborah Tierney	Triest Press

Diarmaid Ó Corrbuí	Carmichael
Donal Traynor	Community Finance Ireland
Eamon Ryan	BNest
Éamonn O'Reilly	NEWKD
Elaine Colgan	Department for Economy
Evanne Kilmurray	Inner City Enterprise (ICE)
Fionn Kidney	Common Knowledge
Gareth Ebbs	Oakfield Trust
Garrett O'Donohoe	Social Finance Foundation
Gavin Callan	Millennium
George Lawlor	Oireachtas
Gerry O'Grady	Enterprise Ireland
Helen Nolan	Spraoi agus Spórt
Isabel Cambie	South Tipperary Development CLG (STDC)
Ivan Cooper	2into3
James O'Neill	Property Marking Ireland
Jeanne McDonagh	The Open Doors Initiative
Jo Sachs-Eldridge	Social Entrepreneurs Ireland
John Evoy	Grow Remote
John Galvin	Living Woodlands CLG
John Kearns	Partas
John Logue	Social Enterprise Republic of Ireland (SERI)
John P. Murphy	Speedpak Group
Johnny Loughrey	No Barriers Foundation
Kathryn Lynch	Chronos Consulting
Kevin Gregory	Rehab Enterprises
Kim Mackenzie-Doyle	The B!G Idea
Leonie Maher	The Cottage Loughmore
Liam McSherry	Social Enterprise Republic of Ireland (SERI)
Linda Ledger	St. Munchin's Community Enterprise Centre
Lisa Rowntree	Action Community & Enterprise CLG
Liz Riches	Waterford Area Partnership
Lorna Conway	DFHERIS
Lorraine Bowen	The Entrepreneurs Academy

Lorraine Corcoran	Afanite/Social Enterprise Republic of Ireland (SERI)
Louise Masterson	An Post
Maeve Monaghan	NOW Group
Mamobo Ogoro	GORM
Margaret Larkin	Donegal Local Development Company
Mario Vottero	Rethink Ireland
Martin McDevitt	Donegal Local Development
Mary Fogarty	Loughmore Community Co-operative Society Limited
Mary O'Shaughnessy	University College Cork
Maura Kiely	Leave No Trace
Maura Walsh	IRD Duhallow CLG
Michael Margey	Atlantic Technological University
Michael Smyth	COPE Galway
Miriam Spollen	Connections Arts Centre
Monica Mckenna	Clare Local Development Company
Nora Fahy	Roscommon Women's Network
Olivia Kitterick	South West Mayo Development Co
Padraic Fingleton	Donegal Local Development Clg
Pádraig Casey	Ballyhoura Development
Patrick Hennessy	Peakconnexxion Ltd
Patrick Mulvihill	Amicitia
Paul Rogers	Northside Partnership
Paul Skinnader	Pobal
Peter Horgan	Gaelic Athletic Association (GAA)
Phil Thompson	Rise at the Cove
Philip Corrigan	ACT
Philip O'Donnell	Local Development Companies Network
Richard Bruton	SERI
Richard Deane	Pobal
Rita Hopkins	Mayo North East Leader Partnership Company
Rob Hansberry	Department of Justice
Ronan Cassidy	John Sisk & Son
Ross Curley	Dublin City Council
Ruthanne Barry	Dcc/Neic and penal reform international

Sam Marchetti	ConsortiaCo
Sara Denedy	Onwards
Sarah Daly	Creative Spark
Sean Mullan	Third Space Smithfield
Senan Cooke	Dunhill Rural Enterprises CLG
Senator Aubrey McCarthy	Seanad Éireann & Tiglin
Shauna McClenaghan	Inishowen Development Partnership
Sinead Ryan	Little Fitness
Siobhán Cafferty	Simplified.ie
Stephen Carolan	Western Development Commission
Steve Dolan	Galway Rural Development CLG
Steven Egan	InterTradeIreland
Steven O'Connell	Football Cooperative
Susan Adams	Education for Sustainability
Tammy Darcy	The Shona Project
Tara Farrell	Longford Women's Link
Tara Lane	Kildare LEADER Partnership
Terry Hyland	Cavan County Local Development
Tim Griffiths	SERI Advisory
Úna Lowry	Dublin South City Partnership