Measuring Oxford's Social Impact Economy: Building a Database for Regional Impact Analysis of Oxfordshire's Social Enterprise Sector

The Laidlaw Scholars Leadership & Research Programme

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Abstract

Social enterprises combine commercial activity with the pursuit of social or environmental objectives, yet their number, financial characteristics and geographic distribution remain poorly understood at the local level. Working with the Oxfordshire Social Enterprise Partnership (OSEP), this study developed a database of 3,095 organisational records using statutory and sector registers, supplemented with Companies House, deprivation and grants data, alongside semi-structured interviews with three organisations. Of the 2,241 assessed records, 1,342 met the inclusion criteria with at least moderate confidence, giving a defensible estimate of approximately 550 to 1,350 social enterprises depending on the strength of evidence required. Among included organisations with available data, income was highly concentrated (Gini coefficient = 0.882), while 79.7% of organisations with a determinable five-year income trend were classified as financially volatile. The analysis further found that the register through which an organisation was identified strongly influenced the information available about it. These findings highlight limitations in existing approaches to identifying and measuring the sector and suggest potential value in clearer tiered definitions, longer-term funding arrangements and more structured reporting requirements for Community Interest Companies (CICs).

Acknowledgements

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1. Introduction

Social enterprises combine commercial activity with the pursuit of social or environmental objectives and have become an important part of the UK economy and public-service landscape. Oxfordshire provides a particularly relevant local context for examining this sector because of its significant economic activity, strong knowledge and innovation base, and diverse urban and rural communities. At the local level, social enterprises can translate wider economic capacity into community-level benefits by addressing needs that may not be met effectively through conventional markets or public provision.

Social enterprises can adopt a variety of legal forms, including CICs, charities, co-operatives, community benefit societies and private limited companies. Many also operate across the boundaries of the public, private and voluntary sectors, meaning that no single statutory register provides a comprehensive picture of the sector. Consequently, evidence on the size, composition and activities of social enterprises remains limited, particularly at the local level. This limits policymakers', funders' and support organisations' ability to understand the sector and target assistance effectively.

Working with the Oxfordshire Social Enterprise Partnership (OSEP), the project aimed to construct a database of Oxfordshire social enterprises, investigate how organisations understand and measure their impact, and identify factors associated with organisational sustainability. The final database contains 3,095 organisational records; 2,241 were assessed, and 1,342 met the inclusion criteria with at least moderate confidence.

The research employed a mixed-methods approach. Desk-based research drew on statutory registers, sector databases and supplementary online sources to identify and classify social enterprises operating across Oxfordshire. This was complemented by semi-structured interviews examining organisations’ experiences of sustainability, operational challenges and impact measurement.

Together, the database and interview evidence provide a clearer picture of Oxfordshire’s social-enterprise landscape and the opportunities and constraints experienced by organisations operating within it. The findings also inform preliminary policy priorities around improving sector data infrastructure, strengthening financial and organisational support for smaller enterprises, and developing proportionate approaches to impact measurement.

2. Literature Review

2.1 What are Social Enterprises?

There is no universally accepted definition of a social enterprise, with interpretations varying according to national context, legal frameworks and institutional traditions (Calo, Sancino and Scognamiglio, 2024). Nevertheless, definitions generally agree that social enterprises combine a primary social or environmental mission with economic activity, using trading or commercial practices to pursue social value and support organisational sustainability (Nicholls et al., 2012; Defourny and Nyssens, 2017). Social enterprises may therefore operate through a range of legal and organisational forms rather than constituting a single formal category.

A distinction is also necessary between social enterprise and social entrepreneurship. Social enterprise refers to the organisational form through which a social mission is pursued, whereas social entrepreneurship describes the activities and processes through which resources and entrepreneurial approaches are used to address social needs (Mair and Marti, 2006; Littlewood and Zaheer, 2018). This distinction allows the study to examine entrepreneurial activity while retaining the organisation as its principal unit of analysis.

For this investigation, social enterprises are therefore defined as **organisations whose primary social or environmental purpose is pursued through commercial activity**. Social entrepreneurship refers to the activities through which these organisations combine and deploy resources sustainably in pursuit of that purpose (Defourny and Nyssens, 2017; Quilloy, Newman and Pyman, 2024).

2.2 How do SEs impact the community?

Social enterprises may generate social, economic and environmental impacts within their communities. Social impacts include improvements in wellbeing, social inclusion, skills development and employability, particularly among groups facing barriers to participation or employment (Nicholls et al., 2012; Noya, 2015). Economically, social enterprises may create local employment, support local spending and reduce pressure on public services by addressing needs that might otherwise require state intervention (Feor, Clarke and Dougherty, 2023). Environmental impacts can include waste reduction, more sustainable consumption and increased environmental awareness (Noya, 2015).

However, assessing these impacts requires caution. Taplin et al. (2013) distinguish between organisational outcomes, which can plausibly be linked to an organisation's activities, and broader societal impacts, such as reductions in poverty or improvements in population wellbeing, which result from the interaction of many organisations and wider contextual factors. Accordingly, this study considers the multiple forms of value that social enterprises may create while avoiding attributing wider social change solely to individual organisations.

2.3 How is Social Enterprise Impact Measured?

Measuring the impact of social enterprises is challenging because organisations pursue different missions and often generate outcomes that are difficult to standardise or quantify (Calo, Sancino and Scognamiglio, 2024). One established approach is Social Return on Investment (SROI), which assigns monetary values to social outcomes relative to investment. However, SROI can risk overstating organisational impact where attribution, deadweight and wider contextual influences are not adequately considered (Nicholls et al., 2012).

An alternative is Theory of Change (ToC), which links organisational activities and outputs to intended outcomes and longer-term impacts (Taplin et al., 2013). Importantly, ToC distinguishes between changes that can plausibly be attributed to an organisation and wider societal effects influenced by multiple actors, making it particularly useful for evaluating complex social outcomes.

Effective measurement therefore requires both quantitative indicators and qualitative evidence. However, smaller social enterprises often lack the staff, time and data systems required for formal evaluation, limiting the extent to which impact can be measured systematically (Feor, Clarke and Dougherty, 2023).

2.4 What Factors Affect the Impact of Individual Social Enterprises?

The impact of social enterprises depends on both organisational capacity and the institutional and geographic environment in which they operate (Defourny and Nyssens, 2017; Calo, Sancino and Scognamiglio, 2024). Access to funding, grants and public-sector contracts can determine whether organisations are able to sustain or expand their activities, while financial pressures may constrain their capacity to pursue social objectives.

Internal factors are also important. Leadership, governance, management experience and access to skilled staff influence organisational effectiveness and the ability to develop partnerships and respond to community needs (Quilloy, Newman and Pyman, 2024). Local conditions, including the availability of beneficiaries, resources, support networks and institutional partnerships, can similarly affect organisational reach and opportunities for impact (Kerlin, 2009).

Finally, organisations differ in their capacity to collect data and demonstrate outcomes, particularly where staff and financial resources are limited (Feor, Clarke and Dougherty, 2023). These factors informed this study's analysis of income, legal form, location, governance and organisational experiences.

3. Stakeholders

The principal stakeholders were Oxfordshire social enterprises, whose participation informed the qualitative research, and Oxfordshire Social Enterprise Partnership (OSEP), which shaped the project objectives, provided sector expertise and supplied existing data. The Oxford SDG Impact Lab and academic supervisor supported the research design and quality assurance throughout the project. Local authorities, funders and social enterprise support organisations are intended users of the resulting database and analysis, as they require reliable evidence to inform investment, procurement and organisational support. Together, these stakeholders ensured that the project remained both academically robust and practically relevant to the Oxfordshire social enterprise sector.

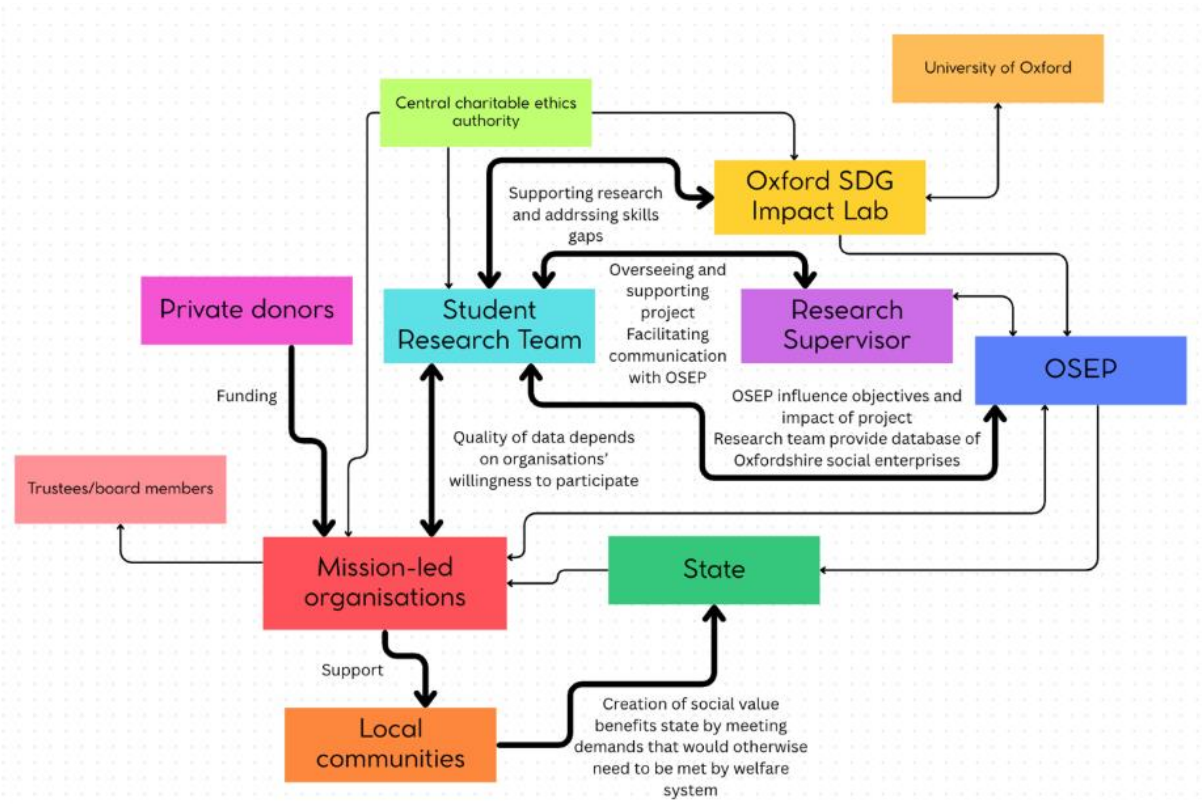

Fig 1. Stakeholder Map

4. Methodology

4.1 Research Design and Data Sources

The project adopted a mixed-methods design, combining the development of an Oxfordshire social-enterprise database with semi-structured interviews exploring organisational sustainability and impact measurement. Records were compiled from the Charity Commission, Companies House, the FCA Mutuals Register, the Centre for Local Economic Strategies (CLES), Social Enterprise UK, Oxfordshire Social Enterprise Partnership (OSEP), and supplementary online research. The resulting database contains 3,095 organisational records, of which 2,241 were assessed against the inclusion criteria and 854 were retained as unassessed candidates for future verification. The database recorded identity, location, legal form, sector, income, employment, governance and organisational-status variables.

4.2 Inclusion and Classification

Organisations were included where available evidence indicated a primary social or environmental purpose and meaningful income-generating activity. Evidence included legal status, membership of recognised social-enterprise networks, governing documents, financial information and public reporting. Organisations were not required to rely exclusively on trading income and could also receive grants or donations. They were excluded where they primarily maximised private profit, relied solely on grants or donations without identifiable trading activity, functioned as grant-making or investment vehicles, constituted public bodies, or operated only as projects within larger organisations.

Records were classified as high, moderate or low confidence according to the strength and consistency of available evidence. High-confidence status was assigned where legal form, recognised sector membership or multiple independent sources clearly supported inclusion. Moderate confidence indicated incomplete but credible evidence requiring further review, while low confidence indicated insufficient or conflicting evidence. This three-tier framework was used to account for gaps and variation in the available evidence while making the level of confidence in classification explicit.

4.3 Data Processing

Initial database processing was partly automated to screen records against the project's inclusion criteria and identify organisations requiring further assessment. Automated screening was followed by manual review and supplementary research, particularly for organisations that were poorly represented in statutory registers, including some sole traders, unincorporated organisations and non-registered entities. This process was designed to improve coverage while maintaining consistency in classification. Records of inactive or dissolved organisations were also retained where relevant to enable analysis of changes in Oxfordshire's social-enterprise landscape.

4.4 Interviews and Analysis

A quota-based sample was drawn from sectors with limited representation in the database (Appendix D). Ten organisations were contacted and three participated in semi-structured interviews conducted in accordance with the project's ethical procedures (Appendix B). Interviews examined organisational mission, trading activity, financial sustainability, operational challenges and approaches to measuring social impact (Appendix E).

Participants provided informed consent, and interview transcripts were analysed thematically using NVivo. Coding focused on recurring themes relating to organisational sustainability, perceived impact, barriers to impact measurement and the outcomes organisations considered most meaningful. A Theory of Change perspective informed the analysis by distinguishing organisational activities, intended outcomes and wider societal impacts (Taplin et al., 2013). Given the small number of participating organisations, the interview findings are treated as exploratory rather than representative of the wider Oxfordshire social-enterprise sector.

5. Results and Findings

5.1 Overview of Variables

The database contains 3,095 organisational records. Of these, 2,241 form the core assessed population and 854 are unassessed candidate records retained for future verification. Within the assessed population, 1,342 organisations met the inclusion criteria with at least moderate confidence. The unassessed candidate records are excluded from the analysis below unless otherwise stated.

Data completeness varies considerably across variables. Identity and geographic information is relatively complete: organisation name is available for all assessed records, while postcode, registration number and legal form are recorded for approximately 89–92% of organisations. Geographic coverage is also comparatively strong, allowing analysis of the spatial distribution of social enterprises across Oxfordshire.

By contrast, financial, governance and workforce variables are substantially less complete. Total income is available for around half of assessed organisations, while employee numbers are recorded for fewer than 10%. Volunteer and governance information also contains significant gaps. These limitations constrain the extent to which comparisons can be made across the full database.

Importantly, missingness is systematically associated with legal form rather than randomly distributed. Charities and Charitable Incorporated Organisations generally have stronger financial and governance coverage, whereas CICs and registered societies are well represented in identity and geographic fields but poorly covered in several financial and workforce variables. This reflects differences in the information collected and published by the underlying registers.

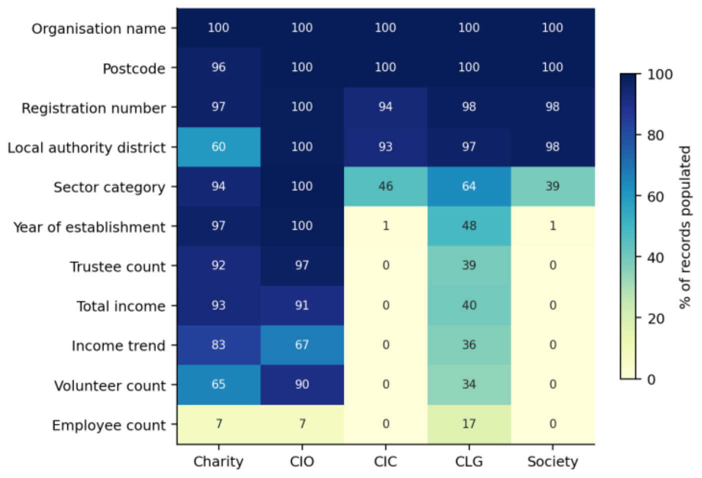

Fig 2. Variable coverage by legal form, core assessed population (n = 2,241)

After treating placeholder entries such as "None Supplied" as missing, usable SIC-code coverage fell from an apparent 69.7% to 46.4%, illustrating how raw non-empty cell counts can overstate data completeness.

5.2 Interactions Between Variables

The analysis identified two substantive patterns and one important data-quality issue. First, data completeness is strongly driven by the source from which an organisation was identified. Presence on the Charity Commission register explains 79.6% of the variation in database completeness, compared with only 0.6% explained by local authority district. Organisations sourced from the Charity Commission have mean completeness of 79.1%, compared with 10.0% among other organisations.

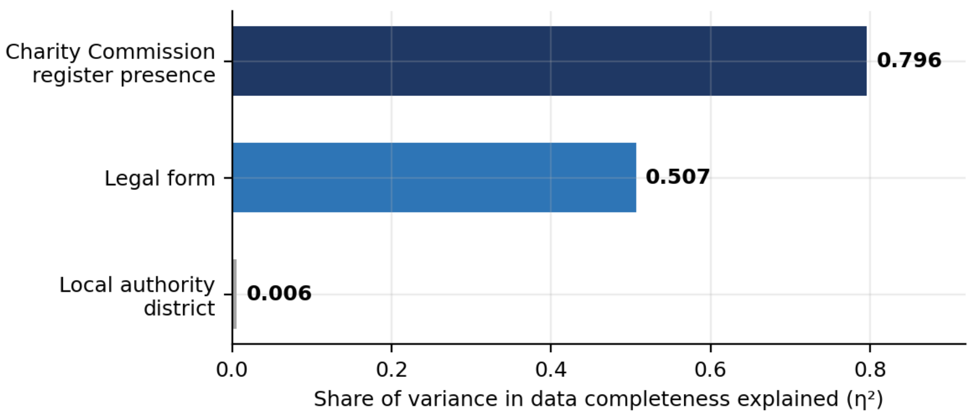

Fig 3. Variance in data completeness explained by organisational characteristics

The Charity Commission and Companies House also cover largely different populations: only 14.5% of assessed records contain both Charity Commission financial data and a Companies House SIC code, while 358 records contain neither. This suggests that the apparent completeness of the database reflects the structure of its underlying registers as much as the characteristics of the organisations themselves.

The clearest substantive relationship is between organisational size and financial stability. Five-year income instability declines consistently as income increases, falling from 84.7% among organisations with income below £25,000 to 53.8% among those with income above £500,000. At the same time, the proportion of organisations experiencing income growth rises substantially across the income bands.

Using Charity Commission financial histories, a simple heuristic classified an organisation as volatile when at least three positive annual observations were available and the spread between its largest and smallest consecutive year-on-year income changes exceeded 50 percentage points.

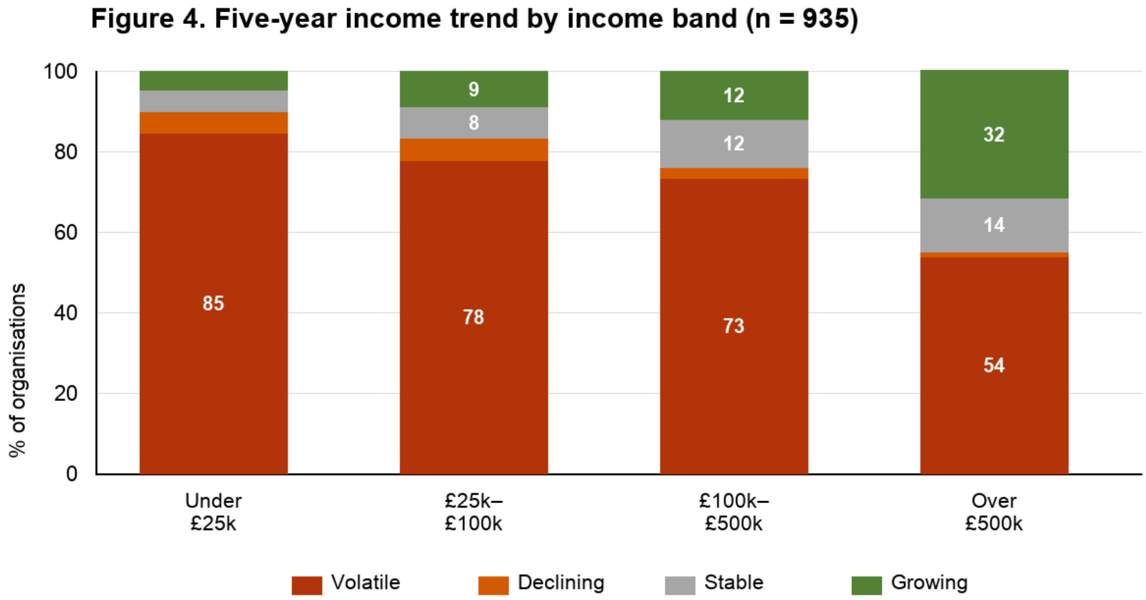

Fig 4. Five-year income trend by income band (n = 935)

Pearson chi-squared tests across the four income bands were significant for volatility ($\chi^2(3) = 61.2$, $p < 0.001$) and growth ($\chi^2(3) = 84.4$, $p < 0.001$). Given that the median income among included organisations with recorded income is below £20,000, the typical organisation falls within the smallest and most financially volatile group. This provides quantitative support for the financial sustainability concerns identified in the interviews.

These relationships should, however, be interpreted cautiously because the correlation analysis is heavily concentrated among organisations sourced from the Charity Commission. Between 99.9% and 100% of observations contributing to the reported correlations come from this source, with no CICs or registered societies contributing observations. The relationships therefore describe patterns within the available charity-sourced data and cannot be assumed to represent the wider Oxfordshire social-enterprise population.

5.3 Data Results

Two descriptive findings stand out. Included organisations are unevenly distributed across Oxfordshire, although registered-office location does not necessarily reflect where services are delivered. Recorded income is also highly concentrated among a relatively small number of organisations.

Applying the inclusion criteria and confidence framework described in Section 4 to the 2,241 assessed records identified 551 high-confidence and 791 moderate-confidence organisations, giving 1,342 organisations meeting the inclusion criteria with at least moderate confidence. Because classification depends on the strength of available evidence rather than a single legal marker, the estimated size of Oxfordshire's social-enterprise sector is best expressed as a range of approximately 550 to 1,350 organisations.

Among the 1,342 organisations included with at least moderate confidence, 792 have recorded income. The financial data indicate substantial concentration and instability. Median annual income is £19,616, while the Gini coefficient is 0.882 and the largest 10% of organisations account for 83.1% of recorded income. The distribution is therefore highly concentrated, with the median organisation operating at a much smaller scale than the sector's largest organisations. Financial instability is also widespread: among the 650 organisations for which a five-year income trend could be determined, 79.7% are classified as volatile. These findings suggest that financial capacity and stability vary considerably across the sector.

Geographically, Oxford contains the largest number of included organisations (306), followed by South Oxfordshire (193), the Vale of White Horse (188), Cherwell (162) and West Oxfordshire (160). Oxford therefore accounts for approximately 23% of all included organisations. However, these figures should be interpreted cautiously because the location of an organisation’s registered office does not necessarily indicate where it delivers its services. Apparent geographic differences may therefore partly reflect the concentration of registered offices rather than differences in the availability or scale of social-enterprise activity.

5.3.1 Data Oversights

The database has important coverage limitations that constrain the conclusions that can be drawn from it. CICs and registered societies account for 355 organisations, or 15.8% of the assessed population, yet none has recorded financial, governance or employment data. This means that high confidence in an organisation’s classification does not necessarily correspond to high data completeness.

This limitation is particularly important when interpreting the financial and workforce results. The financial data available for the analysis are concentrated among organisations sourced from the Charity Commission, while CICs and registered societies are largely absent from these variables. As a result, reported income distributions, financial trends and workforce statistics should not be interpreted as representative of the entire social-enterprise population.

Similarly, a credible sector-wide employment estimate cannot be produced. Employee numbers are recorded for only 9.4% of assessed organisations, with coverage strongly concentrated among larger organisations. Any estimate of total employment based on these data would therefore require substantial imputation and could give a misleading impression of precision.

These limitations reflect differences in the underlying data sources and the extent to which different legal forms are represented in them. They should therefore be treated as a central finding of the database analysis rather than simply as a technical limitation: the organisations identified as social enterprises are not equally visible within the available data. Two further observations follow. The CIC legal form, introduced in 2005, produced no comparable discontinuity in these data: formations in 2005 and the years following are unremarkable. This is consistent with the finding in Section 5.3.1 that the database holds no year of establishment for any CIC, so the form's uptake is by construction invisible in this analysis. The apparent absence of an effect is a property of our data rather than of the policy.

5.4 Interviews: Initial Findings

5.4.1 Sample

Semi-structured interviews were conducted with three Oxfordshire organisations: Epwell Village Hall, Appleton Village Hall and MF Couriers Ltd. The sample was drawn from underrepresented sectors identified through the database and is therefore small and exploratory rather than representative of the wider social-enterprise sector. Interviews focused on organisational mission, income and sustainability, operational challenges, identification as a social enterprise, and approaches to impact measurement.

Table 1: Overview of Interviewed Organisations

Organisation	Sector	Social objective	Primary income source	Principal challenge
Appleton Village Hall	Government, Civic, Religious and Membership Organisations	Bringing residents together through community-based activities	Grants, fundraising events and occasional donations	Limited funding and difficulty involving younger residents

Epwell Village Hall	Government, Civic, Religious and Membership Organisations	Providing a shared community facility and reducing social isolation	Grants, occasional donations and income generated through activities	Recruiting volunteers for committee and operational responsibilities
MF Couriers Ltd	Transport, Logistics, Automotive and Storage	Creating employment through a cooperative business model	Commercial trading income and some grant funding	Accessing finance while maintaining cooperative status and equality in decision-making

5.4.2 Organisational Sustainability

Financial sustainability was a central concern across the interviews, although participants generally understood sustainability as maintaining services rather than generating profit or pursuing growth. As a representative from Epwell Village Hall explained, “The objective, financially, is to make enough money to maintain it and provide that facility.” Appleton and Epwell relied substantially on grants, donations and fundraising, but described these income sources as irregular. MF Couriers reported difficulty accessing commercial finance because its cooperative employment mission was less immediately recognisable to funders; the organisation had ceased operating by the time of interview.

Organisational capacity was also constrained by reliance on small numbers of volunteers. Both village halls reported difficulties recruiting committee members willing to take on ongoing responsibilities, while Appleton identified limited participation among younger residents as a longer-term concern. These findings suggest that sustainability depends not only on financial resources but also on the capacity to maintain volunteer involvement and organisational leadership over time.

5.4.3 Identification and Impact Measurement

The interviews highlighted difficulties in identifying organisations that fall between conventional categories. MF Couriers did not readily identify itself as a social enterprise, while Appleton noted that informal community organisations may operate without appearing on national registers. Participants suggested that local websites, noticeboards and community networks can therefore provide information about organisations overlooked by formal databases. This reinforces the database finding that reliance on statutory registers alone may underrepresent smaller or less formally constituted organisations.

None of the three interviewed organisations used formal systems to measure social impact. Instead, participants assessed outcomes through personal experience, informal observation and their understanding of community needs. Limited staff, financial resources and administrative capacity made systematic data collection difficult. This lack of consistent evidence restricts comparisons across organisations and over time. The interviews therefore suggest that proportionate measurement support may be more useful for small organisations than imposing complex standardised frameworks.

6. Conclusion

This project provides a clearer, though necessarily qualified, picture of Oxfordshire's social-enterprise sector. By combining a multi-source database with semi-structured interviews, it provides an estimate of the scale of the sector and identifies the limitations of the evidence available to assess it. Depending on the strength of the evidence applied, approximately 550 to 1,350 organisations can reasonably be classified as social enterprises, demonstrating the sensitivity of sector estimates to definition and data coverage.

The financial findings indicate substantial inequality within the sector. Income is highly concentrated, while financial volatility is widespread, particularly among smaller organisations. The interviews reinforce these findings, highlighting irregular funding, difficulties accessing finance and reliance on small numbers of volunteers as important constraints on organisational sustainability. They also suggest that smaller organisations often lack the resources to measure impact formally.

A key contribution of the project is therefore the identification of where the database itself needs to develop. OSEP and future cohorts could establish a regular update cycle, systematically incorporate CIC and mutual data, and strengthen identification of informal organisations through local networks. They could also verify registration and contact details, improve coverage of financial and employment variables, and maintain a clear record of confidence levels and changes between database versions. Over time, repeated annual data collection would allow the database to move beyond a static register towards monitoring organisational entry, exit, financial change and sector development.

The findings therefore provide both a baseline for understanding Oxfordshire's social-enterprise ecosystem and a framework for progressively improving the evidence available to practitioners, policymakers and funders.

7. Preliminary Policy Implications

Oxfordshire’s existing support landscape already provides several routes through which social enterprises and community organisations can access funding and organisational support. Local authorities can provide grants and commissioned service contracts, while organisations such as Oxfordshire Community and Voluntary Action (OCVA), Oxfordshire Community Foundation and Community First Oxfordshire provide funding advice, grants and capacity-building support. National funders, including the National Lottery Community Fund, National Lottery Heritage Fund and Sport England, provide additional sector- or activity-specific opportunities. However, the range of schemes also illustrates a potentially fragmented funding environment, particularly for small organisations that rely on short-term or project-specific income.

The findings suggest three priorities for strengthening this existing infrastructure.

First, improve sector data. The substantial gaps in financial and workforce information, particularly for CICs and registered societies, make the sector difficult to assess consistently. OSEP and local authorities should explore a regularly updated, multi-source register combining Charity Commission, Companies House, CIC, mutual and local-network information. Manual verification would remain necessary for informal and unincorporated organisations.

Second, strengthen support for smaller organisations facing unstable income. The analysis found highly concentrated income and widespread financial volatility, while interviews highlighted irregular grants, difficulty accessing finance and dependence on small numbers of volunteers. Existing grant and capacity-building programmes could therefore be complemented by multi-year core funding, small development grants, proportionate procurement support, financial planning assistance and volunteer succession support. Patient or low-cost finance could also be explored for organisations seeking to develop trading activity without compromising their social mission.

Third, make impact measurement proportionate to organisational capacity. None of the three interviewed organisations used formal impact-measurement systems, with limited resources making systematic data collection difficult. Rather than requiring complex frameworks, smaller organisations could be supported to record a limited set of relevant indicators, such as participation, service use, beneficiary feedback or employment outcomes. Existing commissioning and grant processes could incorporate proportionate reporting requirements and, where appropriate, fund the administrative time required to collect this evidence.

The findings therefore suggest that Oxfordshire's policy challenge is not simply a lack of support, but how existing funding, procurement, data and measurement mechanisms can be better coordinated and adapted to the needs of smaller social enterprises. Given the small interview sample and uneven financial coverage, these recommendations should be treated as priorities for further development and piloting rather than proven sector-wide solutions.

8. Limitations

The principal limitation was the project timeframe, which constrained the identification of organisations and recruitment of interview participants. The database relied primarily on statutory registers, stakeholder datasets and publicly available information, meaning informal, recently established and community-based organisations with limited online presence may be underrepresented despite supplementary searches. The database thus provides broad coverage but should not be considered exhaustive. The interview sample was also smaller and less stratified than originally planned. Findings therefore provide exploratory insight into recurring organisational experiences rather than representative or generalisable conclusions. These limitations should be considered when interpreting both the estimated size and composition of Oxfordshire’s social-enterprise sector and the interview findings.

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Appendix A – Rationale for Research

Social enterprises contribute to sustainable development by using commercial activity to address social, environmental and economic needs. This project therefore aligns with several United Nations Sustainable Development Goals (SDGs):

SDG 8 – Decent Work and Economic Growth

Social enterprises create employment, develop skills and contribute to local economic activity while prioritising social value. Understanding their financial sustainability can help identify barriers to their continued contribution to inclusive economic development.

SDG 10 – Reduced Inequalities

Many social enterprises work with communities and groups experiencing disadvantage. Mapping their distribution and characteristics can help identify where organisations are concentrated and where gaps in provision or support may exist.

SDG 11 – Sustainable Cities and Communities

Social enterprises often respond directly to local community needs, supporting services, participation, resilience and community development. Developing a clearer picture of Oxfordshire's social-enterprise ecosystem can support more effective local interventions.

SDG 12 – Responsible Consumption and Production

Environmental and community-focused social enterprises can promote more sustainable production, consumption and resource use. Their activities demonstrate how economic activity can be combined with environmental objectives.

SDG 17 – Partnerships for the Goals

The project itself reflects the importance of partnership between social enterprises, OSEP, policymakers, funders and academic institutions. Strengthening the evidence base can facilitate better collaboration and more effective allocation of resources across the local ecosystem.

The research addresses a key challenge for achieving the SDGs at a local level: without reliable information on the organisations delivering social and environmental value, it is difficult to measure their contribution, identify gaps, or design effective policy and funding support. By developing a local evidence base and examining organisational sustainability and impact measurement, the project provides a foundation for more informed, place-based progress towards the SDGs.

Appendix B – Ethical Guidelines

The project was conducted in accordance with customary research ethics principles. As the project was centred around organisational data collection, the team's primary commitment was to ensuring this data was collected accurately and ethically. Within the interview process, participants were provided transparent information about the purpose of the research project and were reminded that their contributions were entirely voluntary and retractable, with informed consent being affirmed at both the beginning and end of each interview. This data was anonymised where appropriate and stored securely and confidentially. Attuned care was also taken to ensure that organisations were represented fairly, especially considering most of our data was taken from publicly available sources. Classification decisions for status, as mentioned previously, were based on transparent inclusion criteria and supported by the multitude of sources mentioned above. This helped to promote consistency in classification and reduce the risk of researcher bias and misclassification.

Appendix C – Supplementary Tables for Section 5

Omitted from Section 5.3

Table 2. Variance in data completeness explained by organisational characteristics

Grouping variable	Eta-squared
Presence on the Charity Commission register	0.796
Legal form	0.507
Local authority district	0.006

Table 3. Five-year income trend by income band (n = 935)

Income band	Records	Declining	Growing	Stable	Volatile
Under £25,000	372	5.4%	4.6%	5.4%	84.7%
£25,000–£100,000	216	5.6%	8.8%	7.9%	77.8%
£100,000–£500,000	176	2.8%	11.9%	11.9%	73.3%
Over £500,000	171	1.2%	31.6%	13.5%	53.8%

Appendix D – Sector List

1. Agriculture, Forestry, Fishing and Animal Services
2. Business and Administrative Services
3. Cleaning, Landscaping, Facilities and Security
4. Construction, Property and the Built Environment
5. Culture, Arts, Heritage and Libraries
6. Education, Skills and Training
7. Energy and Utilities
8. Engineering, Science, Research and Technical Consulting
9. Environmental Services, Waste and Circular Economy
10. Events, Conferences and Tourism
11. Financial Services and Insurance
12. Food, Drink, Accommodation and Hospitality
13. Government, Civic, Religious and Membership Organisations
14. Healthcare, Medical Services and Wellbeing
15. Household, Beauty and Personal Services
16. Manufacturing and Industrial Production
17. Professional, Business and Administrative Services
18. Publishing, Film, Media and Creative Industries
19. Social Care, Charities and Community Support
20. Sport, Fitness and Recreation
21. Technology, Software, Data and Digital Services
22. Transport, Logistics, Automotive and Storage
23. Wholesale, Retail and E-commerce
24. Unspecified or Registration-only

Reduced from 198 existing categories

Sectors contacted for interview highlighted

<u>Appendix E – Interview Script</u>

Introduction

Hello, my name is [insert name], and I'm conducting research on social enterprises in partnership with OSEP, an organisation established to support and promote Social Enterprises, social entrepreneurs, enterprising charities and purposeful businesses in Oxfordshire.

If necessary -> This research aims to help local and national authorities better understand the practical realities of operating as a social enterprise in Oxford and its wider counties. The insights you share will help inform future initiatives relating to funding, policy, and government support for social enterprises.

Thank you for taking the time to speak with me today. The interview should take around 10–15 minutes. Your responses will be transcribed and used for research purposes only, and any information you provide will be treated in accordance with the project's ethical guidelines. If there are any questions you'd prefer not to answer, that's fine.

Before we begin, do I have your consent to continue with the interview?

Section 1: Understanding the Organisation

1. Could you briefly tell me about your organisation and what it does?

2. Do you consider your organisation to be a social enterprise?

3. How would you define a social enterprise?

<u>(Then provide following definition, if definition provided does not precisely match)</u>

"Social enterprises are defined as "businesses 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 maximise profit for shareholders and owners". "

4. Having heard that definition, has your answer about whether you consider your organisation to be a social enterprise changed in any way? Why or why not?

Section 2: Organisation and Trading

5. What are your organisation's main social and/or environmental objectives?

6. Do you sell any goods or services?

If yes, could you describe your main trading activities?

7. Does your organisation have any other sources of income?

(For example, grants, donations, contracts, memberships, or investments.)

8. Approximately what proportion of your surplus revenue is reinvested into your organisation or towards achieving your social mission?

Section 3: Activities and Impact

9. What are the main activities your organisation undertakes to achieve its aims?

10. How would you describe the impact your organisation has on the people, communities, or environment you serve?

11. Do you formally assess or measure your organisation's impact?

If yes:

How frequently do you assess your impact?

Could you briefly describe how you measure or evaluate it?

12. How would you describe the scale of your organisation's impact?

(For example, local, regional, national, or international.)

Section 4: Challenges

13. What are the biggest challenges your organisation currently faces in achieving its mission or operating sustainably?

14. How would you say the state, both local and national, or organisations like OSEP could support you in these challenges?

Section 5: Organisation Information

I'd just like to finish with a few factual questions.

15. How many employees does your organisation have?

16. Are you an accredited Living Wage employer?

17. What legal form is your organisation registered as?

(For example, charity, CIC, company limited by guarantee, co-operative, sole trader, etc.)

Closing

Thank you very much for your time and for sharing your experiences.

Finally, could I confirm your preferred contact details in case I need to follow up with any clarification?

Preferred contact name:

Email:

Telephone (if different):

Organisation website:

Is there anything else you'd like to add that you think is relevant but that we haven't covered?

Thank you again for participating. Your contribution is greatly appreciated.