THE SOCIAL ENTREPRENEUR'S PLAYBOOK

AN ANALYSIS-TO-PRACTICE TOOL FOR SOCIAL ENTREPRENEURSHIP

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Abstract

The literature on social entrepreneurship has highlighted the need to expand theoretical knowledge across diverse contexts and applications, and to translate this knowledge into effective practices, always grounded in proven concepts. This study aims to understand the social entrepreneurship practices that contribute to the success of social projects and enterprises. Drawing on the "Business Model Navigator" by the BMI Lab, the research investigates the characteristics, processes, and strategies that social entrepreneurs use in their business models to create social value while ensuring the economic sustainability of their initiatives. The findings identified practices that can be organised into five categories of analysis: the entrepreneur's profile, the surrounding social and political environment, the type of innovation applied, the financial strategy adopted, and the achieved impact. Based on these dimensions, the research expands knowledge of social entrepreneurship in Portugal by analysing 20 projects. It provides a practical guide for future social entrepreneurs to learn from proven, effective practices.

Keywords: social entrepreneurship | social entrepreneur | analysis-for-action | model framework | practical tool

Resumo

A literatura sobre empreendedorismo social tem destacado a necessidade de ampliar o conhecimento teórico em diferentes contextos e aplicações, bem como de transformá-lo em práticas efetivas, sempre fundamentadas em conceitos comprovados. Este estudo busca compreender as práticas de empreendedorismo social que contribuem para o sucesso de projetos e empresas sociais. Inspirando-se no modelo do "Business Model Navigator" do BMI Lab, a pesquisa investiga características, processos e estratégias que os empreendedores sociais aplicam nos seus modelos de negócio para gerar valor social, ao mesmo tempo que garantem a sustentabilidade econômica das suas iniciativas. Os resultados identificaram práticas que podem ser organizadas em cinco categorias de análise: o perfil do empreendedor, o ambiente social e político, o tipo de inovação implementada, a estratégia financeira adotada e o impacto alcançado. Com base nessas dimensões, a pesquisa amplia o conhecimento sobre o empreendedorismo social em Portugal, analisando 20 projetos e oferecendo um guia prático para futuros empreendedores se inspirarem em práticas comprovadas e efetivas.

Palavras-chave: empreendedorismo social | empreendedor social | análise para ação | framework de modelos | ferramenta prática

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Part I

1. Introduction

Research Background and Motivation

Social entrepreneurship has a long history, with some tracing its roots to the philanthropy of Mansa Musa in the 1300s and others to Florence Nightingale's creation of modern nursing during the Crimean War in 1854 (Hoover, 2018; Almeida, 2024). However, its conceptual understanding and formal frameworks are a product of our time (Singh, 2014), and the term is increasingly cited in the public sector as a highly effective approach to addressing social challenges. As with many topics in the social domain, defining social entrepreneurship is difficult. Its novelty, lack of established presence, and overlap with government initiatives make it hard to define and distinguish from traditional profit-driven entrepreneurship. Yet, academic research over nearly four decades continues to demonstrate the utility of entrepreneurship in solving social problems. Its definition also helps create fertile ground for studies on how knowledge of entrepreneurship, management, and innovation can be applied to the social sector.

This study is motivated by these unresolved questions and practical observations. With a background in sociology, I have studied entrepreneurship through social lens and believe that traditional entrepreneurial knowledge can be applied to the social market. However, current findings suggest this assumption may be misleading (Santos, 2013). Another source of motivation comes from the fact that, in Portugal, discussions persist about the definition and effectiveness of social entrepreneurship, and the literature emphasises the need for frameworks that integrate social problem assessment and business modelling. These insights inspired research into tools and models of practice in the field, aiming to both solidify the concept and provide actionable tools for practitioners seeking to create, scale, and sustain social impact.

Problem Statement

As introduced above, the topic of social entrepreneurship lacks shared frameworks for addressing social needs and problems, as well as for measuring the financial sustainability of social solutions. Although much literature exists on assessing successful SE case studies, the practical field seems to be lacking a summary of the existing models that lead the most relevant cases of social entrepreneurship to success. It also lacks a tool for learning and implementation for new social entrepreneurs.

Research Question:

What types of practical models do successful social innovation businesses employ? What traits should be kept in mind when designing a business model for social entrepreneurship?

Research Objectives

In the profitable market, Osterwalder's (2010) practical tool, "55 Patterns of Business Models," offers valuable insights into entrepreneurs' creations and practices **and provides tools for replication and adaptation in new contexts**. In the social entrepreneurial context, the absence of standardised tools or commonly recognised social business model frameworks (like the one Osterwalder created for traditional businesses) may result from practitioners'- particularly emerging social entrepreneurs'- inability to design scalable, sustainable, and impactful ventures. While researchers like Santos (2012) have questioned the direct applicability of traditional for-profit business models to social entrepreneurship, there remains a need to explore what adaptations may be applied to social business and which unique traits define the models that succeed in the social innovation space. Considering this, the main objective of this research is to develop a framework of business model patterns used in successful social entrepreneurship. To achieve this goal, there are other milestones:

1. To **discover the conceptual dimensions** that allow research on business models in the social market.

2. **To identify the business models** currently employed in real-world social entrepreneurship initiatives, drawing from both primary (Portuguese cases) and secondary data sources.

3. To **determine the core traits and components** that a business model must incorporate to address a social problem or opportunity effectively.

4. To **systematise the findings into a framework** of social business model patterns, inspired by existing approaches such as the Business Model Navigator and adapted to the specificities of the social innovation sector.

5. Finally, to **contribute to the body of knowledge and tools available** to entrepreneurs by offering a structured model that can support learning and innovation.

2. Literature Review

The starting point of any study should be the exploration of what precedes it – that is, the theoretical field of knowledge constructed by those who have shared an interest in the same topic as us. Social entrepreneurship is known as a framework for addressing systemic social challenges through innovative business practices (Santos, 2012). While the term was formally introduced by Bill Drayton in the 1980s, the phenomenon it describes has existed in various forms throughout history. Over time, the academic and practical understanding of social entrepreneurship has expanded significantly, encompassing not only the definition of the concept itself but also its relationship to traditional entrepreneurship and its role in modern society.

A further literature review aims to explore and analyse a broad spectrum of topics within the field of social entrepreneurship. Drawing on the work of numerous authors and scholars, it analyses definitions, key distinctions between social and traditional entrepreneurship, and the historical line of events that have shaped current perspectives. Furthermore, other concepts under the umbrella term of social entrepreneurship were analysed, including the concepts of social enterprise and social innovation, the characteristics of social entrepreneurs, and the development of social business models. In addition, it addresses issues inevitably brought into discussion, such as self-sustainability and humanitarian entrepreneurship, emphasising the role of collaboration, stakeholder involvement, and human-centred design in creating lasting social impact.

By critically engaging with diverse theoretical contributions, this review seeks to provide a comprehensive understanding of social entrepreneurship as a dynamic and multidimensional field. The analysis will highlight both converging viewpoints and areas of debate among scholars, offering insights into how social entrepreneurship continues to evolve (Appendix 1).

2.1. Social Entrepreneurship History:

It is interesting to see how history differs depending on the author who is telling it. Social entrepreneurship is one of those complex realities where the concept appears much later than its evidence. As mentioned previously, Bill Drayton was the first to define and use the term. But he only did it in the 80s. However, many authors who have studied the topic have recognised that there is evidence of social entrepreneurship cases dating back much earlier. Surprisingly, there is no agreement about the first case of social entrepreneurship.

In the Portuguese social impact industry, there is a consensus that social entrepreneurship began with the case of Florence Nightingale (Almeida, 2024). Florence Nightingale was the woman credited with the creation of modern nursing, who, in the 1850s, during the Crimean War, developed the way soldiers were treated in war, leading to systematic changes in health care that were then applied to different situations. Nightingale's entrepreneurial profile broke traditional models and conceived new ways of caring for the sick, making her a prominent figure in the history of social entrepreneurship to this day. She was, therefore, an entrepreneur who distinguished herself by determination, visionary ability and willingness to take risks (Backes, TosonI, Dal BenI, & Erdmann, 2020). However, other authors, such as Cole Hoove, claim that social entrepreneurship precedes the Nightingale case. Hoove (2018) points to the 15th century with the figure of Mansa Musa - the emperor of Mali - who, despite being a "conqueror" and slave owner, gave us the first example of how philanthropy can contribute to social growth - and did so by investing in the community through building schools and universities. Although this example may raise some doubt because it arises from governance power, the author's example of Thomas Bond - raising money for America's first general hospital - is definitely an example of social entrepreneurship in action. And this is an example from the 1750s.

Nevertheless, it was not until the 1980s, when Bill Drayton conceptualised it and founded Ashoka, which has been responsible for all efforts to promote social entrepreneurship worldwide since then, that social entrepreneurship became formalised as a market activity and a conceptual framework for addressing social problems.

2.2. Social Entrepreneurship:

To begin the theoretical field for this research, it is essential to define the basic concept of social entrepreneurship. First of all, it is important to remember that Bill Drayton first used the term in the 1980s to describe the act of introducing systematic changes in society (Drayton, 2022). With this definition, Drayton places the concept around the idea of "impact of change". Social entrepreneurs aim to create social value (Peredo, A.M. & McLean, M., 2006), and they achieve this through entrepreneurial processes (Singh, 2014). In this sense, social entrepreneurship is defined as the activity of carrying out businesses and projects that are aimed at the creation of social value and

The implementation of systematic changes in society involves putting into practice entrepreneurial processes to achieve these goals.

While this conclusion can be taken as a definition of social entrepreneurship, there have been many other definitions. The explanations discuss the need for social entrepreneurship in society and why it should differ from traditional entrepreneurship. Therefore, to be understandable, the definition lacks comparison with other forms of entrepreneurship.

2.3. Social Entrepreneurship vs Traditional Entrepreneurship:

When defining SE, inevitably, questions arise about how to distinguish social entrepreneurship from traditional entrepreneurship. If the main distinctive feature of SE is that its not-for-profit motive, is any non-profit organisation an example of SE? And can't SE be profitable in any case? Or is it the creation of social value that is the differentiating factor? If so, doesn't every traditional business already create social value? They all benefit society; otherwise, they would not have succeeded.

If we answered “yes” to all of these questions, we would not be able to define social entrepreneurship, because any business can be social, and not all social businesses have to be unprofitable. So what makes social entrepreneurship different from traditional entrepreneurship? The literature suggests that the difference lies in the enterprise's mission (Peredo, A.M. & McLean, M., 2006). Social entrepreneurship is social in its very essence, meaning the goal is to create social value and serve social needs that are not being met. It also means that the business is social in its totality. It incorporates the social mission into its business model and practices (Gugnani & Agrawal, 2014). As mentioned by Singh (2013), everything about social entrepreneurship is different - the mission, the value created, the market, the stakeholders, the approach to innovating and the end impact. And as Santos (2012) defends, "instead of trying to make social entrepreneurs better traditional managers, we need to develop and validate management theories and tools that are coherent with the logic of social entrepreneurship and enterprise". We can better understand the difference between social and traditional entrepreneurship through the inappropriateness of one's business tools to the others’ market requirements (Zacharakis, Walske, & Scarlata, 2013). And it is by understanding these differences that we are able to develop a better approach to SE, one that can lead to success.

2.4. Social Enterprise:

The term “social enterprise” is used variably across the literature, reflecting different interpretations of what constitutes social entrepreneurship. Some authors argue that any company applying social entrepreneurship principles qualifies as a social enterprise, whereas others maintain that it must adhere to a non-profit or mission-first model to be considered truly social. There is also a growing perspective that hybrid forms, such as “B Corporations” (Huddart, 2010), which combine social impact with profitable operations, represent a forward-looking approach to social entrepreneurship. Across these viewpoints, the concept of social enterprise represents the concretisation of social entrepreneurship within an organisational form. In the Portuguese context, although a formal status of “social enterprise” has not yet been institutionalised. Ferreira (2022) identifies a variety of organisational types emerging in response to unmet social needs, highlighting the creativity and adaptability of actors operating in a developing social market.

2.5.Social Entrepreneur:

In a recent interview, Bill Drayton explained the rationale behind the creation of the term was, “we first created the broader concept and name: changemaker. (…) However, we needed a different phrase to describe the small number of changemakers who redefine or create society’s big systems. After some trial and error, we ultimately settled on ‘social entrepreneur” (Drayton, 2022). When the term appeared, it basically described the “entrepreneurs who revolutionised the 'production patterns' of the social area” and by doing so, created an irreplaceable “job position” in the creation of changes in the social system. The aim of the concept was to highlight the people who make a career out of solving social problems, and there seem to be some key characteristics that define them.

First of all, they carry a mission (Michelini, Laura, 2012). The social mission is in the essence of their definition. However, since the social mission is a broader concept and many people outside the business share the mission of solving social problems, we need another criterion to define social entrepreneurs. This second characteristic is pursuing an entrepreneurial approach to solving problems. These are people who see opportunities in yet unsolved society’s problems. They see solutions through innovation and create new ways of meeting social needs by implementing new ideas (Azevedo & Martins, 2014).

So we can conclude that a social entrepreneur is both a personality and a method. The values and the tools are together. Social entrepreneurs are the vehicle of social entrepreneurship, but they are also social entrepreneurship itself. They're the embodiment of social entrepreneurship in the sense that they put into practice and apply the methods for implementing change. "They bring people together, multiply impact, strengthen an idea, and make it more viable and scalable" (Drayton, 2022).

Still, the question arises: is being a social entrepreneur a responsibility? Drayton talks about the ability and need for everyone to be a changemaker. However, as mentioned by Phillips et al. (2012), social entrepreneurs are more than the trend of social responsibility by for-profit companies. They are changemakers who harness innovation at a systemic level and are concerned not only with financial performance, but also with social performance. Then those few changemakers who are able to change the big patterns of society (Drayton, 2022) are the social entrepreneurs. They are the ones with the ability to solve social problems and create systematic social changes because they are able to "play in today's "everything is changing" and "everything is connected" new (and only) reality" (Drayton, 2022) by applying entrepreneurial tools.

2.6. Social Innovation:

At its basis, the concept of innovation describes change in any type of system. The term is deeply rooted in the growth of the industrial society, since it refers to *creation,* but it replaces it with being *more suitable to account for the changes that marked the transition to the current technical-economic paradigm, marked by the expansion of applications and the technologies of information and communication* (Parente, 2014).

Phillips et al. (2015) define it in a simple way: it is the creation of new activities, services and products to achieve the goal of solving social problems and generating well-being in society. In fact, social innovation is the process of innovation in the social industry, but as innovation has always been associated with the technological and profitable market, the term social innovation goes far deeper to be defined. As the context of application changes, so do the processes and definitions, such as when we started applying innovation to solve social problems.

First of all, there is a consensus in the literature that social entrepreneurship follows a model of open innovation instead of the protected innovation model used in the profitable market (Huddart 2010). This has to do with the fact that social entrepreneurship is more stakeholder dependent than a traditional business. The partnerships and the network that create the solutions are valuable assets to solve social problems (Phillips et all, 2015). Therefore, we cannot think about protecting an idea. We must instead think about how to test it. And spread it! - The concept of spreading is also very present in the definition of social innovation, because a successful SE case is one that can be copied and multiplied in different contexts (Santos, 2012). Also, some efforts have been made to narrow down the concept. The RESINDEX model (Unceta et al., 2016) is an example - it defines indicators to define social innovation, and it goes through the existence of 4 processes: exploration, exploitation, evaluation, and participation & collaboration. And in addition to the social innovation's divergence in the process, there are also principles that one must follow to apply it, such as "working across sectors" and "empowering local communities" (Huddart, 2010). The most distinctive features of social innovation are the concepts of open innovation and continuous innovation, since the only way to respond to systemic issues in societies and implement innovative solutions within communities.

2.7. Social Business Models:

The concept of social innovation opens the discussion on how social entrepreneurs design and implement their ideas for social change. This inevitably leads to the role of business models, which provide a structure for sustaining these initiatives as enterprises. Historically, entrepreneurs have always struggled to find reliable plans for operating their businesses. Business models gained recognition in the 1990s, following significant market transformations, when it became clear that simply naming an industry was no longer sufficient to explain how a company created value, as most players once shared similar models. Today, with *increased competition and rapid copying of successful business models* (Osterwalder), designing a strong business model has become critical. For social entrepreneurs, however, the aim is not competition but survival in a challenging market. The greatest difficulty lies in the financial obstacles of the social sector, where markets are often unattractive, customers may be unable to pay, and the balance between effort and return is rarely achieved (Horoszowski, Beason & Liu, 2022; Santos, 2012). Business models, therefore, serve as tools to bridge this gap, helping social enterprises sustain their activities while pursuing impact.

Traditionally, social businesses have depended on external funding, yet there is increasing recognition that long-term impact requires financial sustainability (Unite 2030, 2024). This shift has led scholars and practitioners to focus on models and management practices that not only support social innovation but also ensure resilience. Within this discussion, collaboration repeatedly emerges as a cornerstone. Different authors highlight the value of partnerships across sectors and actors: whether through quadruple or quintuple helix models involving universities, industry, government, civil society, and the natural environment (Carayannis, 2021), or through collaboration between for-profit and non-profit organizations (Huddart, 2010), or through public-private cooperation to tackle complex issues (Gugnani & Agrawal, 2014). Stakeholders occupy a central place in this logic, as they are not only beneficiaries but also co-creators of solutions. Social entrepreneurs operate within this arena, leveraging networks, partnerships, and experimentation to design effective responses (Kruger, 2013).

In this sense, social business models are less about competitive advantage and more about connecting people and resources in ways that enable innovation and sustainable impact. They ensure that ideas for change are not only implemented but also endure in the face of complex financial and social environments.

2.8. Self-Sustainability

As introduced earlier, the issue of self-sustainability in social enterprises is the current hot potato of social entrepreneurship. In the past, many social enterprises relied heavily on external funding, such as grants or donations, which made them vulnerable to fluctuations in funding sources (Unite 2030, 2024). The current discussion is moving towards the creation of businesses that are capable of delivering social solutions while remaining financially sustainable.

There are several ways to achieve this that have been suggested in the literature. The notion of "hybridity" (Walske, Scarlata, Zacharakis, 2013) emerges as the dual identity that social enterprises need to adopt - balancing two goals: creating self-sustaining businesses and solving identified social problems. This is what Gugnani and Agrawal (2014) call "profit for purpose," when the social enterprise implements a profitable model to support and advance its social mission. It is understood by social entrepreneurs that many social enterprises lack revenue streams to continue their impact, and for this reason, their mission in society fails.

Conceptual Framework of Social Entrepreneurship - Summary

This literature review explored key theoretical contributions to social entrepreneurship, aiming to clarify definitions, map conceptual distinctions, and identify thematic patterns relevant to both research and practice. Although formally conceptualised in the 1980s, social entrepreneurship has existed in practice for centuries, as shown by historical figures like Florence Nightingale, Mansa Musa, and Thomas Bond, who used entrepreneurial action to drive systemic social change. The formalisation of the field brought new focus to defining it, with scholars agreeing that its essence lies not in profit orientation, but in the mission to create social value and generate systemic transformation through entrepreneurial methods. As the field evolved, related concepts emerged, particularly "social enterprise" - that, while some view it as the concrete manifestation of social entrepreneurship, others compare it with conventional businesses adopting socially responsible practices. The review concludes, however, that social enterprises are distinct from traditional businesses because of their structural alignment with social missions, innovation methods, and inclusive, collaborative approaches.

The role of the social entrepreneur is central. More than organizational founders, these individuals embody the mission, leverage innovation, and act as agents of systemic change (Michelini, 2012; Phillips et al., 2015; Drayton, 2022). The literature classifies them according to strategic orientation and operational scope, stressing how personality, values, and method combine to define their societal contribution.

Social innovation emerges as the main mechanism through which social entrepreneurship achieves impact. Unlike traditional innovation, it is open, continuous, and stakeholder-centred, producing solutions designed to be replicated and adapted across contexts. Frameworks such as RESINDEX (Unceta et al., 2016) highlight processes of exploration, experimentation, evaluation, and collaboration as core to social innovation.

Business models also represent a major theme, since social ventures must balance financial sustainability with social impact. The concept of "hybridity" is particularly relevant, describing the reconciliation of commercial and social logics. Models like Muhammad Yunus's Grameen Bank demonstrate how hybrid approaches - combining clear value propositions, stakeholder collaboration, and non-dividend structures - can sustain social businesses. The literature consistently emphasises self-sustainability, acknowledging the vulnerabilities social enterprises face and pointing to hybrid strategies, such as "profit for purpose," as viable paths forward.

In sum, the literature offers a multidimensional understanding of social entrepreneurship that integrates theory with practical frameworks, emphasising innovation, collaboration, and human impact. These findings provide a foundation for developing scalable and sustainable social business models, opening opportunities to adapt such frameworks to specific contexts, including Portugal.

Gaps in the Literature and Research Opportunity

After analysing eight dimensions that compose the field of social entrepreneurship, it is now possible to identify some gaps in the literature that meet the research motivation:

1. **Limited Research on the Traits of Successful Social Business Models**

Although the literature identifies challenges in achieving self-sustainability and scalability in social ventures (Unite 2030, 2024), there is no consensus on the critical traits that successful social business models should exhibit. Traits such as stakeholder inclusion, financial hybridity, collaborative networks, and open innovation are mentioned across studies but remain unsystematized. This leaves social entrepreneurs without clear guidance on good practices for designing robust and effective business models.

2. **Geographic and Cultural Gaps — Lack of Contextual Studies**

Despite global examples of social enterprises, little research focuses on Portugal, leaving emerging entrepreneurs without context-specific tools for early-stage model design in fragile ecosystems. This lack of localised insight provides an understanding of how social entrepreneurship practices adapt to cultural and geographic realities.

3. **Disconnection Between Conceptual Theory and Practical Application**

Many authors define social entrepreneurship, social enterprise, and social innovation in conceptual terms, and some even present models of good practices based on a particular case, but few offer a practical and holistic model that entrepreneurs can directly use to look for practices and build or evaluate their ventures (Drayton, 2022; Michelini, 2012) – demonstrating a bridge between the academic insights and the practical field.

The literature review not only highlighted definitional debates and typologies of social entrepreneurship but also revealed significant gaps in empirical studies. In particular, most prior work either presents conceptual frameworks or focuses on single case studies, with limited cross-case evidence on how business models in the social domain are actually configured. This gap directly informed the methodological choice of a qualitative, multi-case study approach supported by semi-structured interviews. By building upon and contrasting with the conceptual lenses presented in the review, this research seeks to contribute to the previously identified gaps by systematising entrepreneurial model patterns currently employed in successful social entrepreneurship initiatives in Portugal and uncovering the essential traits they share. The outcome aims to contribute to the theoretical DNA of social entrepreneurship while providing a practical framework.

PART II

3. Research Methodology

Research Design

1. **METHOD**

As the intent of this study is to create a template that summarises the patterns of social business models, the design science approach was applied in order to analyse case studies. This methodology is suitable for building - in this case, a conceptual template - by analysing case studies and assessing its practical utility.

To construct the template, an analysis of real case studies of social businesses was conducted. As established in the literature (e.g., Komatsu et al.; Mair & Schoen), similar procedures have been applied in different contexts. To contribute novelty to the existing body of knowledge in social entrepreneurship, the case studies will be selected from a primary data source - which means that the case studies will derive from direct interviews with founders and key personnel from social projects. Following data collection, the construction of the template will involve identifying patterns within the observed business models in the likeness of the template of the 55 business model patterns by Business Model Navigator.

Data Collection Method: Semi-Structured Interviews

To gain an in-depth understanding of the social entrepreneurship market, a theoretical qualitative engagement with practitioners was essential. Semi-structured interviews were chosen as the primary method, offering both consistency and flexibility while providing *privileged access to people's basic experience of the lived world* (Kvale & Brinkmann, 2014, p. 32). The interview guide was structured around a multidimensional conceptual model derived from the literature, framing the key elements of successful social ventures across five dimensions (Appendix 2).

The first dimension, **Type of Social Business**, explored the social problem addressed, the organisation's vision, expected impact, and the motivations of founders. **The entrepreneurial Processes** category examined how opportunities were recognised and problems identified, including founder observations and user involvement in solution design (Corner & Ho, 2010). **Social Business Model** questions focused on value propositions, beneficiaries, clients, financial strategies, and support networks, following

Osterwalder and Pigneur’s (2010) framework was adapted for social ventures**. Social Innovation** investigated whether and how projects were perceived as innovative, considering process, product, organisational, technological, marketing, or business model innovations. Finally, **Social Impact** addressed measurement practices and perceptions of outcomes at both individual and societal levels, as well as their role in guiding future strategies and attracting social investment.

Ethical Considerations

All participants were informed of the study's purpose and provided informed consent. Confidentiality of some given facts was guaranteed. The research followed the University of Porto's ethical guidelines for qualitative studies.

Selection of the Sample:

The interview sample was selected with the purpose of identifying and analysing business model patterns in successful social innovation initiatives. To ensure the relevance and richness of the data, a *purposive sampling* strategy was adopted (Ahmed, 2024), selecting organisations based on variables aligned with the research objectives. While the criteria focused primarily on the organisation rather than the individual, efforts were made to interview founders whenever possible, given the study’s interest in entrepreneurial processes such as opportunity recognition and idea creation. Inclusion criteria required organisations to operate in social entrepreneurship or innovation, demonstrate success in Portugal, implement a social business model with a clear mission, and show measurable or progressing social/environmental impact. All participants were based in Portugal and were willing to engage in semi-structured interviews. Initial contacts were identified through social innovation networks and events, and snowball sampling was used to include additional relevant organisations, enhancing sample coverage and sector representation.

Table 1 - Sampling Process: types of contacts

Type of Contact	**Nº of Contacted Organisations**	**Nº of acceptations of the interview**
Made by a previous contact from events attended	8	6
Made based on previous knowledge about the organisation	5	4
Made by research	5	1
Made by the snowball effect	7	3
Total:	25	14

Description of the Sample:

The empirical data comprises **20 interview-based cases,** resulting from 14 interviews, as some managers oversee more than one project/organisation. The interview-based cases draw on semi-structured conversations with founders or managers of social enterprises and provide the primary qualitative material, which was complemented with **secondary sources** such as organisational reports, websites, press articles, and academic publications. This combination allowed for greater diversity of business models and triangulation of perspectives. Accordingly, whenever the text refers to **interview material**, the denominator is $n = 14$. Whenever descriptive statistics or percentages are reported (e.g., the share of projects adopting hybrid financing), the denominator is $N = 20$, as the analysis included both interview-based and document-based cases. This distinction ensures clarity and transparency across the results and discussion.[1]

In Portugal's social sector, three types of organisations were identified as valuable sources for this study: social enterprises/associations, social incubators, and social advisory companies. Together, these three organisational types contributed complementary insights that enriched the final investigation:

Table 2 - Types of organisations in the sample

Type of Organization	Number of Interviews	Advantages
Social enterprise/association	10	Have total information about the entrepreneurial processes. Provides first-hand information and explains the challenges faced and the experiences lived
Incubator	2	Have an enormous scope of examples in the social sector and a very technical view on the variety of business models. Have experienced the evolution of the sector.
Advisory Company	2	Have a lot of cases, and they are explained from a close point of view since they are part of the entrepreneurial processes; they have experienced the evolution of the sector.

[1] Important: See appendices 3 and 4.

4. Data Collection and Analysis

Procedures of analysis

All interviews were fully transcribed and anonymised. The qualitative analysis followed a three-step protocol. In the first stage, labels were assigned to passages related to *mission and problem*, *operational model*, *financial model*, *partnerships and network*, *innovation*, and *impact*. In the second stage, codes were aggregated into categories (e.g., *revenue from services*, *public subsidy*, *donations/philanthropy*, *licensing/impact IP*, *corporate partnerships (B2B2S)*, *third-party payment (B2B2C)*, *structured volunteering*). Relationships and causal conditions were mapped (e.g., *reliance on volunteers* → *reduced operating costs*; *municipal partnerships* → *territorial scaling*). Afterwards, a cross-case synthesis was performed to identify archetypes of entrepreneurial practices and recurring hybrid combinations.

In relation to the elaboration of descriptive statistics, the project was used as the unit of analysis (rather than the number of coded passages). For each archetype or dimension, a project was counted as "1" if at least one clear indicator of that category emerged in the interview or supporting documentation; otherwise ", 0". The denominator for all percentages is therefore the number of valid projects (n) with sufficient information in that dimension. When information was missing (e.g., a project did not mention any innovation in the business model domain), the project was not counted for *n*. When projects could be associated with more than one category (e.g., combining *donations*, *public subsidies*, and *fee-for-service*), to avoid double-counting, percentages per category are calculated as:

$$\%category\_i = \left(\frac{(n)\text{Number of projects with category}}{\text{Total number of projects}}\right) x100$$

In addition, we report the percentage of hybrid projects (≥2 active categories).

Table 3 – Robustness of each dimension (per number of projects with relevant information)

Dimension	Entrepreneur	Environment	Innovation	Business Model	Impact
%category_i	70%	85%	100%	80%	90%

This process enhanced the understanding of each dimension while also revealing connections between different dimensions. The transversality of ideas across multiple interviews suggested the emergence of common patterns– although there was no patterning of the conclusions. The following sections describe how the analysis was applied within each dimension.

1. Entrepreneurial Profiles and Motives

The first dimension examined the creation of the projects and the people behind them, highlighting how the identity and motives of the entrepreneur influence organisational strategies. The findings, consistent with the literature, show that the primary emphasis is on solving the social problem rather than profit maximisation (Azevedo & Martins, 2014). Motivation frequently stems from personal or biographical connections, such as emotional ties or identity-driven values that anchor commitment and justify the pursuit of meaningful social solutions. Professional experience also emerges as a significant factor, as many entrepreneurs entered the field after years of work in sectors where they perceived existing responses as insufficient or ineffective.

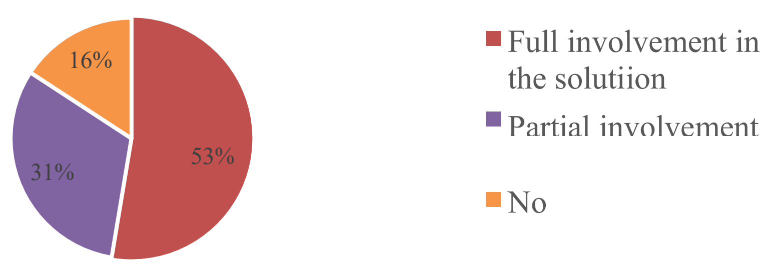
2. Entrepreneurial Process

The second dimension focused on the mechanisms through which social value is created. This process often begins with the identification of unmet needs, as illustrated by Portugal's low rate of formal volunteering. Opportunities were recognised either as gaps in current responses or as new solutions to societal problems. In some cases, these opportunities emerged within institutions, where entrepreneurs sought to correct inadequate social practices, sometimes driving institutional change. There were some patterns identified in the way of approaching social problems and solution creation, for example, persistence was consistently highlighted as a defining trait, reflecting the determination and resilience required to advance social initiatives.

3. Networks, Partnerships, and Ecosystem Positioning

Entrepreneurs emphasised the importance of networks and partnerships in implementing solutions. Partnerships were found to help distribute financial risk and contribute to sustainability – for this, visibility and reputation play a central role. Challenges were also noted, particularly related to official funding programs and the resistance of public entities to change. There were two concepts from the literature that were verified by data analysis - co-creation and user engagement. Co-creation with stakeholders emerged as essential for creating, sustaining, and scaling social solutions (Michelini, 2012). Involving beneficiaries in implementation was common, with 53% of organisations reporting full engagement through co-creation, active participation, or solution scaling through mentoring programs, and 31% reporting partial involvement, mostly through feedback collection and iterative improvement (see Graph 1).

Graph 1 - Projects that involve users in the solution

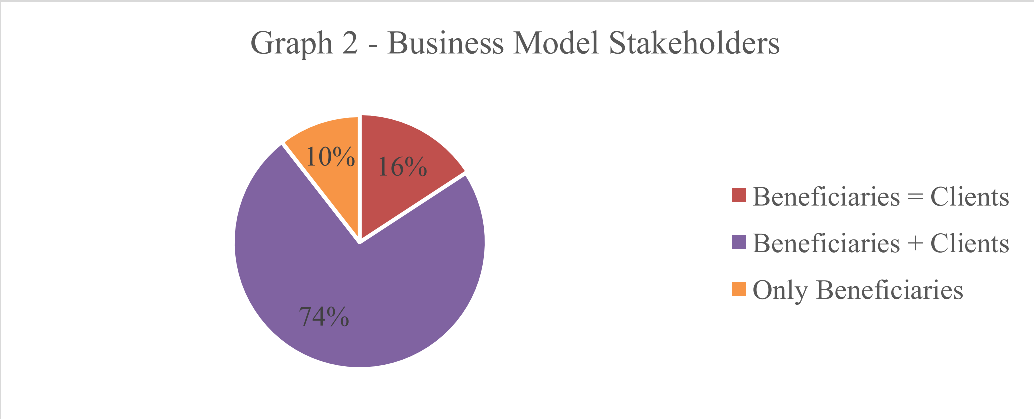


4. Innovation and Differentiators

This dimension examined what distinguishes these organisations from others in the market. Differentiation was sometimes achieved through innovative practices, but other times through consistent strengths in areas such as recruitment, training, and engagement strategies. Innovation itself was multifaceted – being this through organisational, solution, process, marketing, profit-model, network, and systemic innovations, each representing a space where social ventures generate unique value and impact.

5. Clients and Beneficiaries

The final dimension addressed the characteristics of beneficiaries and their relationship to financial structures. As mentioned in the literature, beneficiaries are often unable to fully finance solutions themselves (Santos, 2012). Most organisations (74% – see Graph 2) employed hybrid business models, where clients contributed financially while beneficiaries accessed the service for free or at a reduced cost. In 16% of cases, beneficiaries were also clients, paying directly for the solution. In 10% of cases, projects relied entirely on public funding, with beneficiaries receiving the service for free as part of public policy initiatives. The hybrid approach mentioned earlier reflects the balance between achieving social impact and maintaining financial sustainability in the Portuguese social sector.



6. Business Models and Monetisation Logics

Understanding who funds the projects clarified how social ventures design their business models. Organisations often combine multiple business models, not only to ensure financial sustainability but also to enhance visibility and diffuse their innovations. In these models, client segmentation varies: municipalities often act as institutional payers, companies and schools may contract services, and individuals sometimes purchase solutions directly. Emerging trends, such as ESG and carbon-offset policies, offer additional opportunities for monetising impact within the private sector.

7. Impact, Measurement, and Selling of Impact

The final category examined impact, focusing on measurement, outcomes, and scaling. Social ventures use quantitative, qualitative, and recognition-based methods to assess results. Measurement itself becomes a marketable asset by providing proof of effectiveness, legitimacy and admission for funding: *here are the numbers that validate your investment* (Inclusion4you).

Part III

5. Proposed Framework for Social Business Analysis

Social entrepreneurship has emerged as a critical field at the intersection of market-based approaches, social value creation, and systemic change (Dees, 1998; Mair & Martí, 2006). Seminal articles have called attention to the need for integrative frameworks that address the complex interplay between the complex dimensions of the social market (Zahra et al., 2009). Next, a framework will be presented that aims to respond to this call by organising the core elements of social venture development into five interrelated dimensions: the **Entrepreneur**, the **Environment**, the **Innovation**, the **Business Model**, and the **Impact**.

The definition of these five dimensions resulted from the analysis of the study of the 20 case studies that were presented previously. It was understood that their analysis wasn't enough to conclude patterns of social entrepreneurship; however, the insights from the qualitative research allowed the discovery of very relevant dimensions of the field. Each dimension is anchored in well-established theoretical streams yet configured to fit the outcomes of the data analysis. This framework aims to integrate within the growing body of knowledge and tools advocating for holistic, context-responsive tools for social entrepreneurial project design and growth (Mair et al., 2012).

To the final framework, it was given the name of "**The Social Entrepreneur's Playbook**", because it aims to serve as a tool for inspiration and design of social-driven businesses. But first, and without further delay, let's understand the five frameworks that compose the Playbook – starting from the first dimension (the entrepreneur).

1st dimension - Typology of Social Entrepreneurs

We'll start the analysis of the collected data from the exploration of the entrepreneurs (n=14), as usually they were the ones answering the question, and because rarely the history of the project would have an origin that wasn't deeply connected with the entrepreneur. This category of analysis was entitled "**Social Entrepreneur"** and emphasises the role of the individual as both **mission-driven actor and entrepreneurial manager**. Their work combines deep personal commitment with pragmatic entrepreneurial methods, allowing them to address immediate needs while aiming for systemic transformation. The social market is diverse and gives place to different types of motivation and approaches,– it is *a space of convergence where we would easily integrate Mother Teresa of Calcutta, Steve Jobs and Obama* (Azevedo & Martins, 2014).

The analysis of this concept through the interviews mainly allowed the identification of the personal motivations behind the foundation of the social project. This variable (entrepreneurial motivation) and others, when related to their approach to the creation of an entrepreneurial project, allowed the identification of some patterns that led to thecategorisationn of the entrepreneurs into “profiles”.

Figure 1- Seven Types of Social Entrepreneurs
(Creation of the dissertation’s author)

1) Alternative Creators

The alternative creators are entrepreneurs who recognize that achieving lasting social impact often requires deep organisational change.

Rather than simply replicating existing institutions and public answers to social problems, they use entrepreneurship is an act of creation of alternative answers to a problem that is not being well solved – *there aren’t enough answers or there are no answers, in short, well done* (Social Innovation Sports). In some cases, they prefer to create new spaces and organisations to offer society alternative solutions: *My mother had been working in this area for many years, but we wanted to create a community of our own, with our identity* (Associação Unificar).

These entrepreneurs are usually people who have worked in the system, and, during their careers, they have critically reflected on whether their work truly meets people’s needs. They resist superficial solutions (“band-aids”) and emphasise deeper structural responses

- *the feeling I had is, "we work so hard and are not doing for anyone what the person really needs". So, we're here to put on some band-aids* (LongeVidade). All interviewees highlighted two key factors enabling solution creation: their experience allowed them to identify shortcomings in existing social responses, and a sense of dissatisfaction with those solutions motivated them to act. This combination fostered an evaluative and self-critical approach focused on genuine, long-term transformation rather than short-term fixes.

2) Lived-Experience Advocates

Their personal biographies (for example, experiences of disabilities or growing up in a disadvantaged environment) define their sensitivity to social problems and to excluded social groups. They bring authenticity and credibility to their initiatives because they speak from within the lived experience of the problems they aim to address .***This also has a little to do with my personal journey****. I am the daughter of refugees; I grew up in a social neighbourhood* (Inclusion4you). One important aspect that was highlighted by one of the entrepreneurs was the belief that for being successful in the creation of the answer, it was important they weren't limited by theconstraintss of feeling the problem in its totality:

> *Something that I think was decisive for the solution was the fact that I'm not color blind. Because it got me working within an area or with a certain type of audience, with a limitation or condition that I did not feel.* (ColorADD)

The motivation could come just from a personal sensitivity to the problem or from a life experience that had led them to be in the role of the creators of the solution - *it was funny because* ***I had never thought of mentoring, despite having lived it*** *(...) my brother is younger than me (and) I was always the mentor, that, the big brother.* (MentorArt).

3) **Value-Driven Founders**

Value-driven is the main concept used to describe social entrepreneurs – the idea of the social entrepreneur as *the lone visionary striving at all costs to bring about social change* (Mair & Schoen, 2005). These entrepreneurs start with social problems rather than personal ambition, prioritising impact over organisational creation. They strategically concentrate resources on initiatives capable of producing durable, systemic change, reflecting a clear vision for scale and focus – *we realised that we would rather invest in a project that made one and only lasting impact on people's lives than invest in three or four small things that had a limited impact.* (Pedalar Sem Idade)

The focus is on addressing unmet needs without overburdening the social market with solutions with no impact. *Then they realised that there was already a lot of response in this direction. Perhaps creating another association, in this way, would be more unhelpful than solving anything* (Just a Change). These social entrepreneurs prioritise creating genuine social impact over market presence, aligning with literature that defines them as mission-driven individuals who "are focused on a social mission while behaving as true entrepreneurs" (Michelini, 2012). Their mission serves as the anchor for the entrepreneurial process, framing their initiatives as temporary interventions rather than permanent enterprises. And the threshold of this is demonstrated in a transversal idea between these entrepreneurs, that is: *the success of the successes of an entrepreneur is to be able to stop having to dynamise the project. No problem anymore. (...) Perhaps I will channel my forces to someone else who may have emerged in the meantime.* (Andreia Moutinho, about the project META).

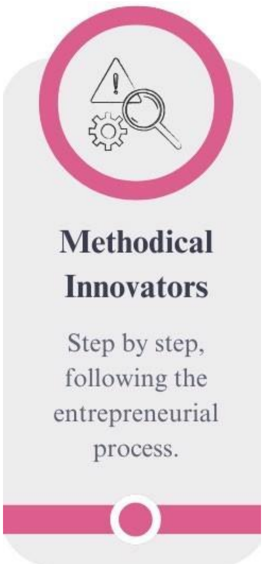
4) Skin in the Game Managers

So remember that the heroes of history were not classicists and library rats, those people who live vicariously in their texts. They were people of deeds and had to be endowed with the spirit of risk-taking (Taleb, 2018).

"Skin in the Game" is an expression that characterises those who really put themselves out there for the vision they have. These entrepreneurs are the ones that aren't just giving advice or watching from the sidelines – they have something of their own (money, reputation, time, resources) at risk, so they're motivated to care about the result. By investing their own funds into the project, entrepreneurs increase both personal and collective commitment.

> *And then what we did was put all the money that the club had, our personal money too, in the first vehicle. That also greatly increased the commitment, right?* (Pedalar Sem Idade)

Often, it was possible to understand that their entrepreneurial energy compensates for the absence of resources - *What was the key? (...)* ***was the will****. It was the energy,* ***the will to accomplish****. Because it was not money. (…) Was believing, right? I think the key was to believe.* (Aldeia Pontemieiro).



5) Methodical Innovators

These are the entrepreneurs who usually have more knowledge about entrepreneurial processes. They prioritise experimentation, evaluation, and adaptation. The opportunity recognition is often grounded in research and understanding of a gap in the existing responses or an opportunity for social development.

> (*They) decided to found the IES to map this ecosystem. And two years after this mapping, it was realised that we had to train. The mapping was so strong, the network was so good, so we had to start training these people.* (IES)

This work of evaluating and testing the external environment can be done in the beginning of a project implementation - *in each territory, we start by mapping the supply, so we start by knowing all that that territory has to offer older people, (…) when the community does not have what people need or look for, we create this solution ourselves* (LongeVidade) – or in the end of a project (when the solution is no longer necessary). Since, if there's no need for the solution they are offering, they must stop the effort - *Then we can realise, "****ok, it is to continue? The city still needs this tool, or else not, the tool is worn out?****" (...) the goal is just this - to adapt us according to the needs of what the city will give us.* (CIS)

6) Social Bricoleurs

Inspired by the idea of bricolage, these entrepreneurs make use of what is immediately available to them - such as urban culture, sports, or street practices - to create social value. This concept arises from the study of Zahra *et al.* (2009) that acknowledges 3 types of social entrepreneurs, and among them there are the "social bricoleurs", the "especially clever in assembling and deploying resources in pursuit of their chosen causes" (Zahra et al,, 2009).

They mobilise peers around accessible tools and practices and use the "local resources" to create solutions. These resources can be people, knowledge, spaces, material, etc. Their innovations usually come as "from the people to the people" type of ideas: *While he was dancing break, he realized that the neighbourhood kids were involved (…) and realised that it was a model that could be replicated. (…)So, the story, is very simple, isn't it****? Born on the street, in an urban sport, which is the break, and then it begins to expand to others***. (Transformers)

Here, the entrepreneur's background is a key asset, as they leverage personal and professional experiences to create social value. They creatively combine skills and resources to generate meaningful societal impact.

7) Civic Stewards

Some entrepreneurs see themselves not as creators but as stewards of valuable ideas at risk of disappearing. Instead of creating, their role is to preserve, maintain, and scale initiatives that might otherwise vanish. In this sense, entrepreneurship is understood as continuity - ensuring the survival of socially valuable things.

They had this idea - we don't want this to die. (Aldeia Pontemieiro)

The concept of stewardship—acting as a guardian—has roots in various fields, notably biology. Aldo Leopold, a pioneer of ecological stewardship, stated that "a thing is right when it tends to preserve the integrity, stability, and beauty of the biotic community, but wrong if it tends otherwise," framing the earth as a community rather than a commodity. This perspective introduces the example of João Soutinho, a biologist and civic steward who founded VERDE to protect nature:

> *And he realised that those trees that aren't properly giant, but which exist for a long time, if they cease to exist, to compensate for what those trees bring us, we would have to plant lots of new trees* (VERDE).

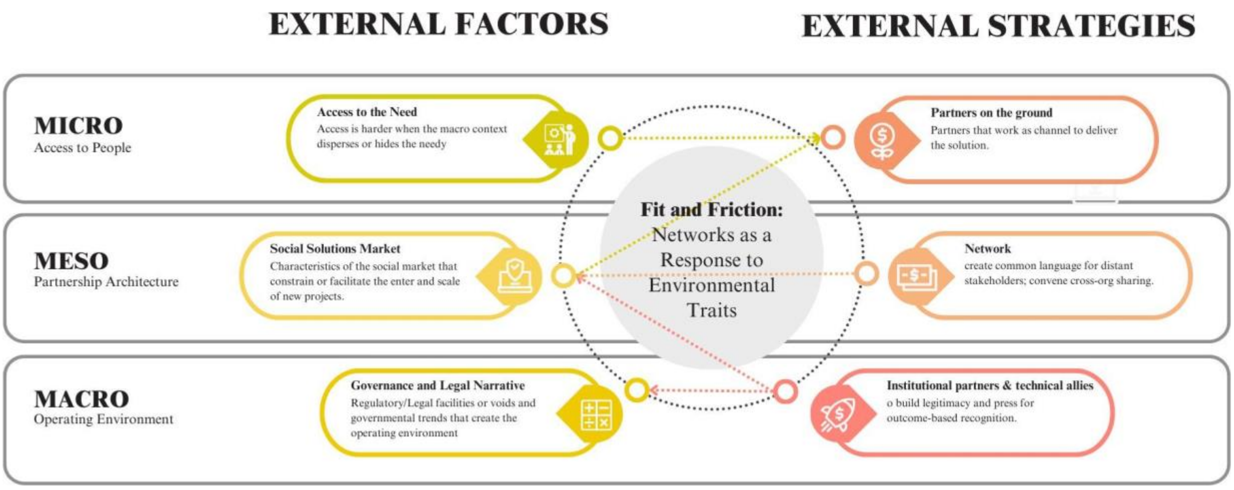
Such entrepreneurs are creators, not merely preservers. They develop ways to safeguard beneficial aspects of society, often navigating environments that challenge them to honour the past while society moves rapidly forward.

Tosum upp the social entrepreneurs' typology, we conclude that from the way of creating solutions to their commitment to the mission, social entrepreneurs may have different profiles that define their approach to the social ecosystem. Mixing different characteristics from the seven profiles can enhance the capacity of impact creation in the social sector.

2nd Dimension - Environment Framework

The analysis of social projects reveals that their capacity to generate impact depends not only on internal models of operation but also on their ability to interact with external contexts. The category of "**Environment**" was created to identify the ecosystem where the entrepreneur operated and the use that they made of it (*n*=17). The analysis of the ecosystem originated two variables – the **social sector** and the **network**. The connection of these variables is rooted in a "fit and friction" relationship, where the constraints in the social sector can be fought through the opportunities of working in a network. The data collected from the stakeholder maps and environmental analysis illustrate how organisations build strategies of adaptation and resilience through networks and partnerships. The final discovery was understanding how these relationships are best understood when framed across three levels: micro, meso, and macro.

*Figure 1 - **Environmental Fit & Friction Framework** (Creation of the dissertation's author)*



Micro-Level: Access to People and Needs

> *I did not know how to bring something into the world that is born for the world, that does not depend on technology, but depends on our partners. Co-creation is the essence of the whole process.* (ColorADD)

At the micro-level, social enterprises face the challenge of reaching the populations they aim to serve, often hindered by social dispersion, invisibility of vulnerable groups, lack of local knowledge, or low trust. To address this, organisations rely on partners within communities, who act as channels for delivering solutions. This can occur in two ways: either by partnering with local NGOs, associations, and community leaders, who provide legitimacy and facilitate communication – *for the dissemination of the project we have partners such as the IPSS, where we went to seek the target population, parish councils, municipalities* (Walking Football) – or through the business model itself, using clients as delivery agents – *at the same time that they are our customers, they are our suppliers because they are those who produce material that has the code* (ColorADD).

This network-driven approach allows initiatives to overcome barriers of distance, stigma, or fragmentation by embedding within existing community ties. In some cases, the business model itself is designed primarily to maximise impact rather than profit, as one entrepreneur explained: *We were able to effectively design a model in which we were able to integrate businesses into our interventions, and therefore make house-poverty known to many people, at the same time* (Just a Change). By leveraging clients as both participants and channels, Just a Change addresses a core ecosystem challenge: the lack of awareness about housing poverty in Portugal. Similarly, other social ventures face difficulties not only in identifying beneficiaries but also in convincing stakeholders of the importance of the problem and the relevance of their solution - *sometimes it's a little weird to have to convince someone why that problem is important or why this answer here is important* (Social Innovation Sports). These examples illustrate how micro-level networks are crucial for enabling social enterprises to deliver impact effectively within constrained environments.

Meso-Level: Partnership Architecture and Social Solutions Market

At the meso-level, the analysis focuses on partnerships and the dynamics of the social solutions market. Social enterprises often face constraints that limit their capacity to scale, including limited resources, fragmented funding, and competition within the social sector.

Constraints may arise from other organisations, funding programs, or the population they serve. One challenge highlighted is the presence of “undeclared competition”, where organisations operating in the same domain struggle to collaborate: *There is undeclared competition between social economy organisations. (...) Let’s say, okay, you have home support, we have home support, and they also have home support. If the three of us have a human resources problem, let’s come together and create a solution. This can’t be done* (LongeVidade).

Misconceptions about social entrepreneurship further constrain the sector. Many assume it is purely charitable, while in reality, financial sustainability is essential for impact: “*I believe that people fall very much into the fallacy that social work is charitable. (...) Therefore, I think this is one of the main gaps, fallacies, and prejudices, that are behind those who listen to us* (Inclusion4you). Constraints also arise from funding programs, which are competitive and limited, requiring creativity to be navigated*: Many companies have social responsibility, just as, we are in a country that does not have this culture, first thing, and those who have this cultureares often already pointed to some programs that somehow monopolise this social environment* (MentorArt).

To overcome these constraints, organisations build networks and partnerships that facilitate collaboration, align goals, and enhance legitimacy. Alliances with other social ventures, private companies, and municipal agencies serve not only as resource-sharing platforms but also as mechanisms to increase visibility in a fragmented market: *And then the universities that also collaborate a little here with this issue, more related to research* (Walking Football). Partnerships are also shaped by emotional and mission-based affinities, which foster trust and alignment between social entrepreneurs and funders:

> *And this search for affinities, isn’t it? The Serralves Foundation, why? Because the President is from beyond the land. And is this concern for personal relationships? When we talk about cases, projects with drug addicts, sometimes we joke: ‘The best thing is to see which CEOs have kids on drugs’. It’s easy. (...) this search for these affinities, because it is about working on social causes and investors have to be emotionally involved in the thing too*(Aldeia Ponte Mieiro).

Overall, meso-level networks demonstrate a strategy of “fit”, transforming market constraints into collaborative opportunities through partnerships, legitimacy, and affinity-based connections.

Macro-Level: Operating Environment and Institutional Partners

At the macro-level, social enterprises operate within broader legal and governance frameworks that often create uncertainty and restrict innovation. A major challenge in Portugal is the absence of a formal category of "social enterprise": *We don't have 'social enterprise' in Portugal. We don't, it's a big gap here. But it is very difficult for us later, not having this legal nomenclature and (...) to be able to guarantee that the answers are given effectively* (Centro de Inovação Social). Legal obstacles are compounded by sector-specific regulations and, more often, by the culture of public institutions, which can resist change despite the existence of laws and solutions: *The prison* ***systems themselves have a hard time accepting this****. And then there is a law, there is a mechanism that allows this to work out, which will be a much stronger autonomy mechanism. And of these 14 thousand, only 300 in the country were in this system* (Natal de Priscos).

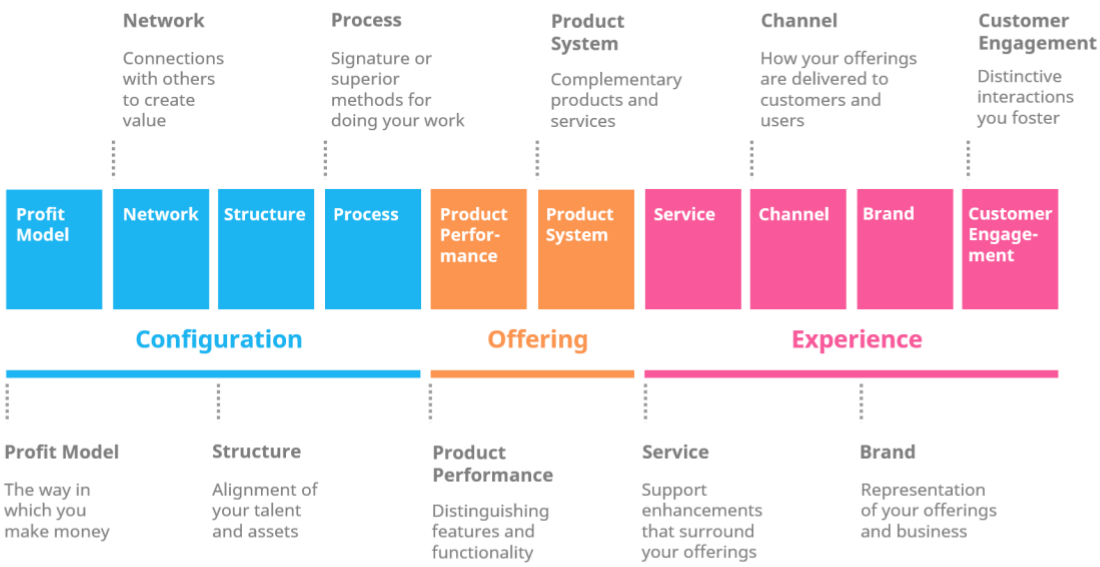
To navigate these constraints, social organisations develop strategic partnerships with universities, national agencies, and international donors, which provide legitimacy and enhance credibility: *UEFA is also already laying down rules and is already starting to promote walking football, so it will be something that will grow worldwide* (Walking Football). These alliances anchor initiatives within formal systems and reduce vulnerability to political shifts. Positive macro-level trends, such as corporate obligations under ESG policies, also create fertile ground for social enterprises by linking them with socially responsible corporate funding: *Companies need to have three pillars – environmental, social and governance (...). And for this, nothing better than joining the dynamics that already exist in the community* (Aldeia Montemieiro).

In summary, the environment analysis frames the social entrepreneurship ecosystem through a "fit and friction" lens, showing how organisations navigate and leverage external environments. The social sector ecosystem and networks interact to overcome constraints across levels: at the micro-level, partnerships deliver solutions locally; at the meso-level, legitimacy helps address sector challenges and misconceptions; and at the macro-level, credibility and strategic alliances mitigate legal and political constraints while supporting resilience and growth.

3rd dimension - Types of Social Innovation

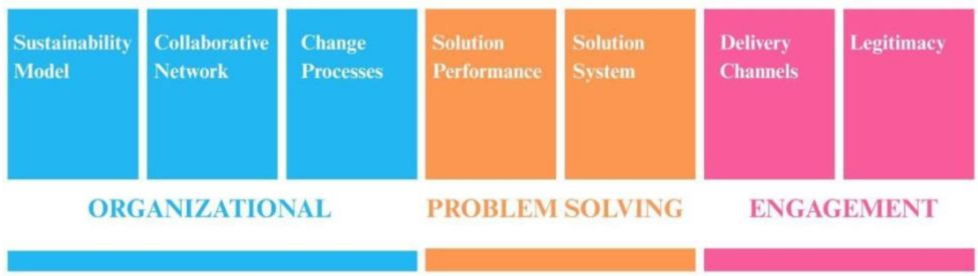
Based on the *Ten Types of Innovation* framework, from Doblin Inc., the 20 social entrepreneurial project examples were analysed and categorised (*n*=20).

Figure 2 - Ten Types of Innovation Framework, (Doblin Inc., 1998)



Doblin's Ten Types of Innovation was originally created for the private sector, emphasising profitability. However, applying it to social entrepreneurship requires reinterpretation, since the ultimate goal is social impact rather than financial gain. In turn, the goal of the analysis was to study social innovation without *implicitly treating them as similar to business innovation and, as a result, ignoring many of the special conditions needed to make them flourish* (Brandsen *et al.*, 2016). To avoid this, the study adapted the framework to align with social innovation cases. The choice to adapt this conventional model, rather than use existing social innovation frameworks, was deliberate: the research sought to test how well social cases could be analysed through the Ten Types lens, and to adjust it where necessary.

Figure 3 - 7 Types of Social Innovation
(Creation of the dissertation's author)



Adapted from the *Ten Types of Innovation* Framework, by Deloitte

The adapted framework reduces the original ten categories to seven, while maintaining the three overarching areas of analysis, but with revised terminology. The definitions from the original framework were used as analytical guidance, but terms such as “product” were replaced with “solution” to reflect the problem-solving focus of social innovation. Importantly, as Keeley (2013) highlights, successful innovators rarely rely on a single innovation type. This was also evident in the study: many social ventures combined multiple innovation types in their solutions, showing the versatility and hybrid nature of innovation in the social sector (see Appendix 2).

Configuration

Sustainability Model:

Just a Change, Mudar o Mundo, Walking Football

The **Sustainability Model** replaces the traditional *Profit Model*, acknowledging Azevedo’s and Martin’s (2014) argument that *the main focus of a leader of an initiative of* (social) *nature is to create value for society and not capture the created value* (Azevedo & Martins, 2014). One interesting thing about the profit model was the fact that, although some organisations distinguish themselves because of the way they make money, the focus was never on the profit. To illustrate this, the statement of Patrícia, from Just a Change, goes straight to the point: *Because there you go, with companies, the sustainability is not only about having financial investments,* ***it is also about the number of people we can alert to the problem of housing poverty and the number of people we can involve*** (Just a Change).

Collaborative Network:

GirlMove, Fundação Lar Nossa Senhora do Livramento

Instead of calling is “Network” as it was in the Doblin’s framework, the inclusion of the term “collaborative” aims to highlight the idea that, in the social sector, the collaboration is the key to success, since it *catalyzes work in a network of solidarities that allows, (…) to increase the ability to deal with complex* systems (Parente *et all*, 2014). For the collaborative network type of innovation, we have the example of the two projects that work with girls. The Lar Nossa Senhora do Livramento has known for a long time that the “*ability to attract patrons here is also a distinctive factor*”. And the GirlMove is a great example of an innovative strategy of connecting with people that will help to grow the impact - "*make online calls with world leaders, you know, like Durão Barroso, the wife of Obama, the wife of Bill Clinton. Many people, many people.* (GirlMover). The collaborative nature of the network in the social market is, as these examples show, key to the success of the solution - *more than other types of innovation, social innovations require intermediary agents for successful diffusion* (Brandsen & Evers, 2016).

Change Process:

Aldeia Ponte Mieiro, Natal de Priscos, Transformers, GirlMove, MentorArt

Finally, **Change Processes** reflects the view that social innovation is often about transforming governance practices and institutional routines to foster inclusivity and empowerment, rather than merely optimising internal operations. Here, two types of process innovation were identified: 1) based on the method of solving the problem, first because you volunteer through what you like to do – t*here is no pre-defined program (...) Then there is the follow-up, isn't it? Have professional teams to accompany your journey of growth, also as a mentor* (Transformers) - and the 2) is based on the quality of the process – *a differentiating thing (...) is the incredible quality. (...) Suddenly you have a women's leadership academy in Nampula, in the north of Mozambique, with girls from all over the country, at the level of Harvard University* (GirlMove).

Offering

Here, the only change was shifting from "product" to "solution". The solutions are still exposed to innovation processes and to performance objective. However, a (social) *firm's primary objective may be to increase its social impact, instead of its competitive advantage* (Zacharakis, Walske, & Scarlata, 2013). So, the term "solution" aims to highlight that performance in this field must be measured by the impact of the solution in addressing unmet needs rather than by conventional market indicators (Santos, 2012).

Solution Performance:

Inclusion4you, ColorADD, Centro de Inovação Social Porto, Just a Change, META, Pedalar sem Idade, LongeVidade

This type of innovation involves entirely new products and updates that deliver a distinct value to the market. A lot of the interviewed organisations happened to be the “first-movers” of the market (*at least when they started - was innovative when I started. At this point, Ana is no longer. There are already others doing it* (Inclusion4you). Sometimes, the solutions were completely innovative, and other times they consisted of simple ideas but targeted to an unserved need - *innovative above all because there were no answers, for this problem in concrete, there was a huge void* (META).

Solution System:

Lar Nossa Senhora do Livramento, Walking Football, Inclusion4you, Social Innovation Sports

For this type of innovation, a good example is the Fundação Lar Nossa Senhora do Livramento, that to ensure that the girls would be able tp live autonomously in the society, they not only created a whole system of solutions to educate and prepare them – *they even have inside some mini autonomization apartments, where they train the girls as if they were already living on the street* - but they also innovated in the way that they qualified their human resources to make them specialized in pedagogical preparation of the girls - *anyone who interacts with girls, is prepared for a certain orientation with them*.

Experience

Delivery Channels:

IES, MentorArt, Associação Unificar

This type of innovation can be found in the way of dealing with the beneficiaries – like in MentorArt: “*is having a set, a multi-layered support network, that is, the mentors know that there is always someone who is there to help them*”. In their study, Parente et aal.(2014) highlight the importance of organisations having “message diffusers” to deliver their solutions to a society that is not yet ready for them.

Legitimacy:

IES, ColorADD

The final type was called **Legitimacy** in the place of “brand”. For social entrepreneurs, success depends not on market visibility alone, but on **trust, credibility, and recognition** from diverse stakeholders. These types of innovations are *typically the result of carefully crafted strategies implemented across many touchpoints between your company and your customers* (Keeley, 2013). This includeswaysy of communicating, of delivering, of partnering, etc. These requires making decision that don't compromise the brand image of the solution that is being delivered –*an implementation poorly done, badly referenced, it is worse than not having this implementation, because if we are going to mislead, and if people still do not, the thing is not consolidated, if people do not feel confident, go to reject, this can not happen.* (ColorADD)

To sum up the innovation analysis, the presented framework aims to offer a closer look at the social entrepreneurial analysed projects' reality but adapted it to reflect the specific logics of social innovation. Case studies showed that many organisations innovate across multiple categories.

4th Dimension - Typology of Business Model

The "**Business Model**" category was central to the study (*n*=16), illuminating how initiatives fund their activities while keeping services free for beneficiaries and ensuring that revenue mechanisms align with mission delivery. Five major types of business models emerged: (1) revenue contracts with public actors and companies, (2) diversified funding mixes, (3) partnership-based programs, (4) productized income streams, and (5) mission safeguards. Business model analysis was conducted alongside an examination of value propositions, highlighting how organisations position their solutions to partners and beneficiaries. As Osterwalder defines, a business model represents how an organisation creates, delivers, and captures value, making the value proposition inseparable from the evaluation of the model itself.

Interview data show how organisations implement these concepts in practice, often combining multiple business models to sustain operations while preserving mission integrity. The revenue structures are closely linked to the types of value propositions offered to stakeholders. It is important to note that only selected examples are presented here; this does not imply that each organisation only applies one model, nor that the strategies are exclusive to the organisations illustrated.

Figure 4 - 5 Types of Social Business Model
(Creation of the dissertation's author)

Fee-for-service (B2G/B2B)

Delivering measurable social impact as a service.

1) Fee-for-Service (B2G/B2B)

One of the most recurrent models is the establishment of fee-for-service **contracts with municipalities (B2G) and companies (B2B)**, where the value proposition centres on impact-as-a-service rather than a traditional product. Peredo and McLean (2006) note that this mission-centric approach distinguishes social enterprises from for-profit oorganisations In practice, municipalities often become paying clients while beneficiaries access services free of charge: *No beneficiary pays anything. At any time! Neither the transformers, nor neither apprentices, nor the mentors. Nobody pays absolutely nothing. (...) it's all supported by this impact-selling business model. We sell the impact to municipalities, and the municipalities pay for implementation* (Movimento Transformers).

Social enterprises innovate not only in sustaining their models without compromising impact but also in selling their value proposition to paying clients. Organizations invest in measuring social impact to demonstrate the effectiveness of their solutions: *They can almost guarantee, and have a very high success rate, - they can ensure that children, when they leave there, they will have integration at work, in society, they will not have to return to the foster house, (...) or to another institution, or to prostitution*"(Fundação Lar Nossa Senhora do Livramento). Selling impact to municipalities often translates into cost savings, such as reduced healthcare expenses or lower demand for social services (Walking Football).

Private companies also engage with social enterprises, motivated not only by tax benefits but by the social impact and visibility their investments generate*: Another great motivation companies are, clearly, the tax benefits they have, when investing in Just a Change (...) but the main motivations of the companies, are if they are effectively able to have social impact, and really have social impact in an innovative way, and often in a visible way* (Just a Change). Companies increasingly seek social organisations to meet ESG responsibilities, rather than addressing these challenges internally. For instance, VERDE sells carbon offset cards to companies and individuals, allowing them to compensate for their carbon footprint while supporting environmental projects. *They work with companies or individuals in carbon offsetting. That means, people can buy carbon offsetting cards, and they are responsible for planting trees or returning to the environment some advantages* (IRIS about VERDE)

2) Diversified funding mix

Another common strategy for financial sustainability in social enterprises is **diversifying funding sources**, often combining public support, private social investment, funding programs, and the sale of services or products. This approach responds to the organisation's need to sustain operations while scaling impact: *We have a series of projects with them, in which they (the clients) are the ones who make the application (for funding programs) and therefore the funding goes to them, but, as we are partners, we also receive some funding. Then, another percentage is revenue. And here, part comes from the training we do, another part is merchandising* (Associação Unificar).

This strategy aligns with Michelini (2012), who emphasises the role of entrepreneurial methods in making social missions replicable and sustainable. Diversifying both the types of investors—public, private, and programmatic—and the revenue-generating activities increases the likelihood of long-term sustainability. As Mulgan (2006) notes, many social initiative *ideas fail not because of inherent flaws but because of the lack of adequate mechanisms to promote them, adapt them, and then scale them up* (Mulgan, 2006). Creative approaches to revenue generation are particularly effective, including events and activities integrated into projects:.*We also capture resources through team building, some events that we also do, aand lso insert within some projects, such as the Welcome Cup - which was a football tournament for companies, in which some beneficiaries were playing and entered the teams of the companies* (Social Innovation Sports). This form of financial sustainability combines the previous business model and others.

3) Partnership-based programs

Partnership-based programs, such as corporate volunteering or team-building initiatives, represent a business model where the value proposition is based on both experience and reputation rather than direct fees for social impact. These partnerships create long-term relationships, allowing companies to invest in social projects to increase societal impact while aligning with corporate social responsibility strategies. They also generate positive externalities, such as enhanced employee engagement and improved social reputation: *Companies* *invest in Just a Change, and commit to our mission. (...) And, with that investment, we ensure, for example, that Just a Change partner companies throughout the year – they gain communications in our networks, have access to our impact reports, and specific impact reports, and also have volunteer jobs* (Just a Change).

In return, social enterprises provide visibility and impact reports to partner companies. As Gugnani and Agrawal (2014) note, such partnerships embed the social mission within a broader stakeholder network. The interviewed entrepreneurs emphasised that these partnerships are not only crucial for funding but also for delivering solutions, often combining financial support with active collaboration in project implementation: *They go to companies – each company pays like X thousand euros or something to get a Girl Mover for a month, so she can go there and do an internship.* (GirlMovers). These arrangements are flexible, adapted to the needs of both the organisation and the partnering companies.

4) Productized income streams

The fourth business model identified focuses on **productized income streams**, where social solutions are transformed into tangible, scalable products or services.

In **licensing**, organisations sell the use of their innovative solutions while ensuring mission alignment. For example, ColorADD explained how the clients can play simultaneously a role of client and supplier, *Because they are the ones that produce material that has the code*. This organisation is an example of a revenue model based on the sale of a fee for use of the code in others' products. However, this model requires careful decision-making, as the ones concerning the sale of exclusivity to one single client: (In case of exclusivity) *I'm missing an opportunity to put this on others. That can't happen because the generating effect 'mee too' is what we want. If this is used and it has an impact, the other one wants to use it too, and then we're going to guarantee two things: first of all, we have no competition, and then we will have many more products with the code in the street* (ColorADD).

Social franchising applies commercial franchising principles to replicate social initiatives in a structured and scalable way, maintaining alignment with the mission. An example is Pedalar Sem Idade: *we pay a royalty to Denmark, which is paid through the* *purchase of vehicles from them, so that we can implement the project. In addition, we also pay for the position of the name. The e-mail, for example. (...) gets a fee for us to implement in this location* (Pedalar Sem Idade).

Corporate volunteering programs, such as team-building initiatives, productize social services to generate both revenue and awareness. Just a Change highlighted this dual purpose: *our sustainability depends, first of all, on the programs we have with companies. Because there you go, with companies, the sustainability is not only about having financial investments, but also about the number of people we can alert to the problem of housing poverty and the number of people we can involve* (Just a Change).

Consulting combines revenue generation with awareness-raising, helping clients address gaps in knowledge or comply with social responsibility requirements. Inclusion4you described this approach: *Are the companies that hire us, proceed to pay, and we work the full scope of inclusion. (...) (These) were people who have already had a lot of need, or because there has been an episode in which they could not give the answer, and, effectively, they understood that they needed something more to come up with these challenges* (Inclusion4you).

Sale of Goods – some organisations create tangible products that embed social value, turning solutions into sellable assets. Mudar o Mundo explained: *The methodology, which includes the children's book and the manual. Teacher training is included in the price of these materials, so they do not pay for training* (Mudar o Mundo).

Methodology Transfer allows organisations to scale their impact by selling their approaches to other entities, reinforcing the mission while reaching broader audiences. This is part of the idea of collaboration in the place of competition that is argued in the literature as central in the creation of social business models (Michelini, 2012). The end goal is to deliver the created solution to society. And if it reaches a higher range, it will more probably serve more people who needed it. META described this process: *They are working for young people in the foster home, but it is not the young people from the foster home who pay for this project. The Meta Project is trying to sell their methodology to local power, such as municipalities, or also entities that can have social responsibility and can be very aligned with this area of youth* (CIS about META).

5) Mission safeguards

Mission safeguards operate across all business models, ensuring **trust, legitimacy, and inclusivity**. Beneficiaries are guaranteed free access, while companies and investors are assured that their contributions align with the social mission. In this way, investors act as “safeguards,” supporting social entrepreneurs in delivering value to those in need without compromising the mission due to operational costs.

We say: ‘accompanying a person. 4 to 6 hours per week in a line of preventing physical and cognitive decline costs X. The person should pay, in our opinion, 5%, 10%, or 20% of their income per capita according to calculations. And the investor pays the rest. (...) The investor pays more or less according to the income of the person, but we have nothing to do with it because our service always costs the same. Yes, you pay what you can afford (…) with the income you have. And the funder, in a logic of solidarity, complements (LongeVidade).

This model reflects the principle that solutions must remain accessible to all who need them. Pedalar Sem Idade emphasised: *our intention was that the project would be free for everyone. (...) We thought it was not fair that we were entering the gate of the institution just to meet people who could afford the 12 euros* (Pedalar Sem Idade). As this aligns with Santos (2012) argument that social entrepreneurship operates in the hard public – it’s not worried about frameworks like Porter’s 5 Forces, because they see opportunity where there’s a need, even if there’s no availability to pay for the solution.

To sum up, this category, we conclude that business models that rely on productized revenue streams translate their mission into tangible goods and services. These innovative ways of selling intangible value demonstrate how productisation transforms social missions into replicable, market-viable propositions without undermining their core intent.

5th Dimension - Impact Measurement Pathways

Aligning Metrics with Strategic Purposes

Measuring social impact is no longer a collateral technicality: it is a strategic pathway that connects mission with legitimacy, finance and scaling. Social enterprises operate under dual logics – social value and economic viability – and, hence, face multiple stakeholders. The more complex the stakeholder map, the greater the demand for evidence of effectiveness, coming from beneficiaries, funders, partners, and markets (Peredo & McLean, 2006; Walske, Scarlata & Zacharakis, 2013).

A major challenge in the social sector is the nature of the impact itself. Unlike commercial markets, where legitimacy can be measured by sales performance, social enterprises cannot rely on financial metrics alone. As the Centro de Inovação Social explains, *you can't put people in little boxes* – highlighting the difficulty of evaluating complex social outcomes with standardised, one-size-fits-all methods.

The analysis of the interviews (where *n*=18) allowed the identification of 3 categories of analysis about impact measurement – ways of measuring, measured impacts, and uses of impact proof. Based on the findings on these three categories, a purpose-fit framework was created that aims to design impact measurement to the stakeholder purpose it serves, and different purposes require different kinds of evidence and instruments (Santos, 2012; Phillips et al., 2015).

1. Legitimacy & Visibility – requiring rigorous, often standardised evaluations to reassure investors and the public and secure formal support.

2. Partnership Performance – emphasising operational, evidence-rich indicators for municipalities, foundations, or corporate partners to monitor and renew investments.

3. Internal Evaluation – using formative, narrative-driven metrics to support management and long-term mission sustainability.

4. Selling Impact – creating "fit-for-purpose" indicators that allow outcomes to be monetised, providing assurance for buyers and investors.

Figure 5 - Impact Measurement Pathways Framework
(Creation of the dissertation's author)

The framework is structured around four main blocks, each representing a distinct purpose of measurement, with connected pathways showing how organisations assess impact and performance. **Legitimacy & visibility** rely on rigorous, often standardised evaluations to provide visible proof of impact, reassuring investors and securing institutional credibility. **Partnership performance** emphasises operational, evidence-rich indicators that enable paying clients to monitor outcomes and renew contracts. **Internal evaluation** focuses on mission-support metrics, using lightweight, formative measures and narratives to guide management and long-term sustainability. Finally, **selling impact** involves monetising evaluation outcomes, using comparable indicators or "fit-for-purpose scores" that serve as a guarantee for buyers and investors.

The goal of this framework is to provide social entrepreneurs with a tool foraligningt offorts to measure impact and strategies to increase impact outcomes. It's a <u>purpose-fit approach that aims to support organisational strategy and business model design - because measurement should work as a lever, not a burden</u>.

Measurement for legitimacy and visibility

What is the goal here? – The goal is to be seen in the social market as a "good bet". Although not competitive in the traditional sense, the social market is not a "blue ocean"; most social sectors feature multiple actors addressing the same problems. For a solution to succeed, it is not enough to solve the problem effectively - it must also be visible and positively perceived. Without recognition, neither the public nor investors will support it. To address this, organisations invest in rigorous impact measurement, generating credible evidence that helps them gain visibility and legitimacy in the social market - *we were just promising, right? Nobody knew us well. We were just a group of cool kids. Nobody knew if this had much impact or not. We were nothing more than kids who wanted to do things until the first serious impact study came out* (Movimento Transformers).

Impact in social enterprises is often measured through in-depth evaluation using rigorous, standardised metrics. This precision is especially important when organisations are applying for funds, as measured impact often serves as a key selection criterion. Even after funding is received, a large portion of project resources is dedicated to impact assessment: *for Gulbenkian, it is the main dimension of the project, and that takes a very large slice of the project,which is the evaluation* (Associação Unificar).

Beyond legitimacy for funders, organisations also seek visibility, which may help attract investors but is primarily used to reach beneficiaries and expand stakeholder networks. Increasing the stakeholder map is considered crucial, since *social innovation is always related to collective social action aiming at social change* (Cajaiba-Santana, G., 2014). Visibility can naturally enhance scalability through word-of-mouth: *what works is by word-of-mouth. And we almost do not have this need to be us doing dissemination.* (IRIS)

Interestingly, visibility can occur without formal impact measurement and may result from strategic choices. As one organisation explained: *What we have been doing is to create a portfolio of implementations within each sector, that brings confidence to the followers of what we do. (...) What we usually call the* ***early adopters****, because these are the ones who will make others gain confidence (...) The whole process arises in the moment of these using it - the big player – and then the thing is consolidated, so the others will go after.* (ColorADD).

Media exposure also contributes to this process: *as the project appears more on television, there are more individuals to join, and these barriers (meaning pains of scaling) have been eliminated* (Pedalar Sem Idade). Together, legitimacy and visibility, grounded in demonstrated outcomes and recognised entities, play a central role in enabling the scalability and societal reach of social solutions.

Measurement for internal evaluation

Impact measurement in social enterprises serves not only to demonstrate success to stakeholders but also as a management tool. It acts as a diagnostic, allowing organisations to test outcomes and align resources with mission objectives (Komatsu et al., 2016). As one entrepreneur explained, *it is not to control us, it is even to motivate us. Because the impact measurement, I thin,k is a factor in making us believe that things are happening* (ColorADD).

This purpose is guided by an impact-first narrative: *for me, what is important is not to sell a project, but rather than the project works and that it is sustainable over time* (Inclusion4you). Sustainability here refers to sustained social impact rather than mere organisational survival. Measurement helps organisations determine ongoing relevance and decide whether to scale or discontinue initiatives.

In health, nobody sends a drug to market without testing it. It doesn't happen. (...) We, in the social area, do not do this. We go straight to the field, and if this goes wrong: 'look, it will go wrong, but we have to do it anyway'. And we have to start testing on a small scale so that we can actually see if it works. What doesn't work? What adjustments do I have to make? - to then demonstrate this potential to leverage and grow? (Centro de Inovação Social).

This strategic purpose does not always require highly rigorous measurements. Mission-support metrics, including proxy indicators and informal feedback, allow organisations to evaluate direction and effectiveness. Qualitative evidence can also serve as measures of impact: *We can measure the impact* ***not only by the quantitative issue, but also by the qualitative*** *(...) There are already medicines with the code to identify this. And this had to be approved by the regulatory entity (...) that is also impacted – it is a regulatory entity approving the integration of an innovation promising inclusion (...)* ***recognition is also an impact measurement factor*** (ColorADD).

Measurement for partnership performance

We are entering the field of client/partner, and as we've seen, in the business models analysis, often private and public entities play the role of "buyer" or "safeguard" of the social solutions. As the transactional social asset is usually intangible, the need to measure the impact is higher than in any other market. Investors want to know if their money is being "well invested", and clients want to know if they are receiving the outcome that they paid for.

When a certain solution is sold to a municipality or a private entity that feels the need for which the organisation has the solution, what is sold are the outcomes of that solution. For example, if a municipality hires a social organisation to train their social workers in the field of social innovation, the value that the municipality is purchasing is the increased knowledge and capacity of their workers – this impact will probably be noticed by the municipality over time, but it's usually required a report of impact from the organisation that delivered the service.

Impact for clients is usually measured through progression indicators that track beneficiaries' outcomes. This evidence allows municipalities and companies to decide on contract renewal and strengthens trust in the organisation. Reporting to partners is therefore essential for both accountability and financial sustainability. *There is usually a study for each client. This halways happens - each client has a study and a report of what happened during the project and what impact was generated* (IES).

Measurement for selling

The sale of impact was a pre-defined metric in this study – organisations were asked whether they monetised their measured outcomes to attract new clients. This concept stems from the idea that in the social ecosystem, impact itself becomes an exchangeable asset by generating legitimacy and resources (Carayannis et al., 2021). While most respondents affirmed this practice, some indicated it was not their primary strategy, giving rise to the previously presented fit-for-purpose measurement categories.

Measuring for commercial goals involves using impact as a value proposition to acquire new clients. Social organisations compile results in reports to demonstrate effectiveness to private and public clients: *We always have updated numbers on the percentage of civic engagement, school success or failure rates, and then you go directly to municipalities that have strategies for these areas, and you go straight to those sites to attract investment from people who are interested in your offer* (Movimento Transformers).

However, reports alone are not always sufficient. Effective client acquisition often relies on storytelling, which creates emotional engagement with the problem: *I usually share the story of Person X, who lives in this house. When we met him, we met a gentleman who was depressed and did not talk to anyone and did not leave his house. That's it, he had no water, so he could not take a shower and was ashamed to go out on the street. (...) after we do this (house) rehabilitation the life of this man was totally changed (...) today he is a super active person, always super arranged, he is volunteer at the Social Center, so he returned to communicate with people and, there it is, that's why I say, this has an impact on the level of physical and mental health* (Just a Change). Storytelling translates outputs into societal outcomes and fosters engagement from investors, clients, and partners (Siebold, 2020). Another strategy emphasises the financial benefits clients gain:

- **Companies** seeking to meet ESG metrics can be convinced through reports showing how investments achieve European Union ESG criteria: *We also do reporting at the level of carbon footprint, (...) because it also interests companies to invest in projects that are not only socially sustainable, but also environmentally* (Pedalar Sem Idade).
- **Municipalities** are attracted by solutions that reduce public costs*: If we can ensure that these young people have a support, a reference figure, that almost guides them to find employment, to be autonomous, to have self-esteem, to be able to have routines - we will probably free the state from all these answers* (CIS about META).

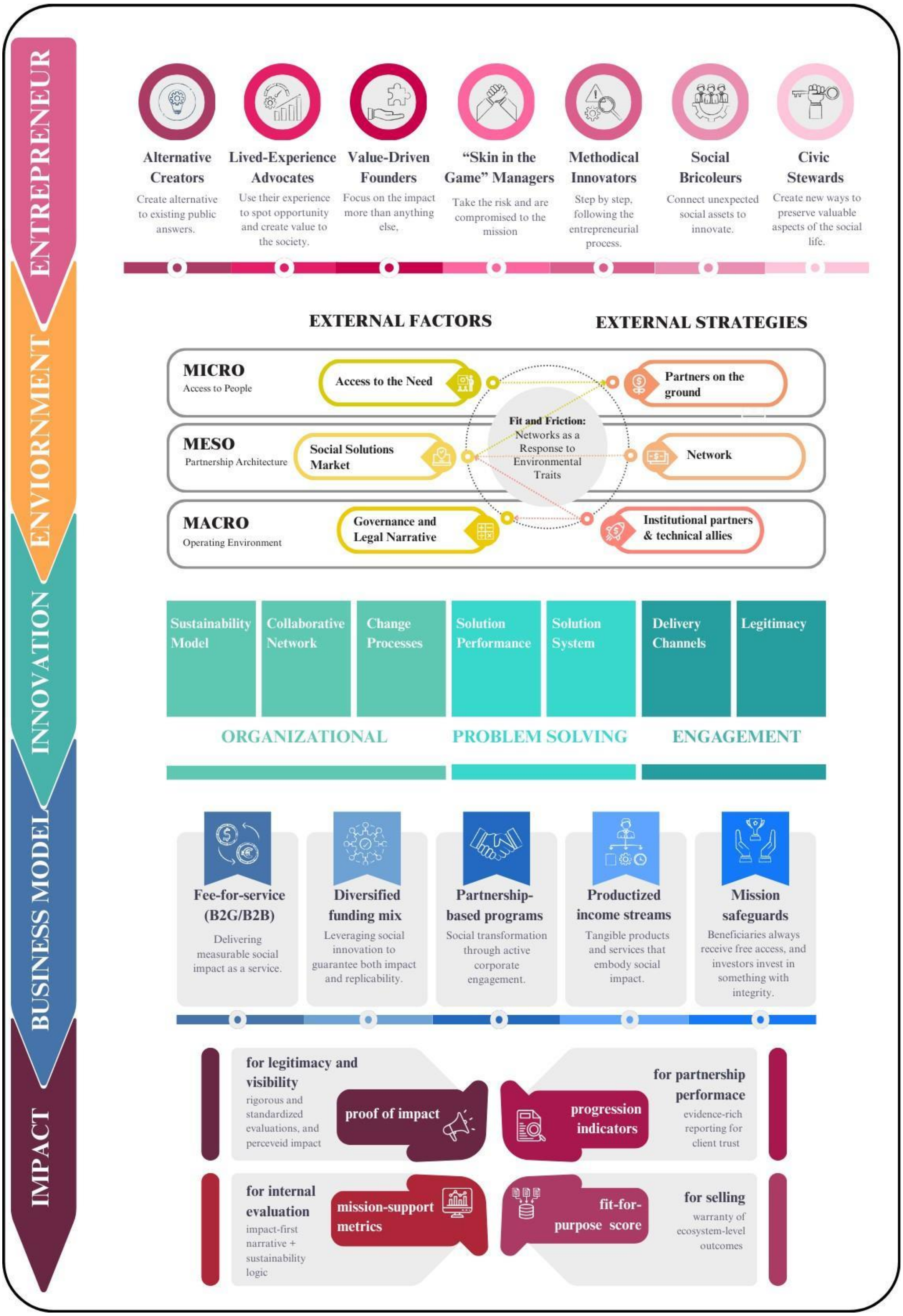
Other conclusions on Impact Measurement

We must also note that there is an incredible effort made by the social organisations to achieve these goals and strategies. We could understand that measuring impact is not an easy task, and *it's not for every organisation*. It requires creativity in analysis and in selling mechanisms because often the resources to supply technical measurement are short and the environment is challenging. It's usually necessary to prove that there's an impact to have funding, but often *we can't prove it because we don't have the resources to measure impact* (SIS). To answer this problem and also to gain more credibility, it's common for organisations to partner with universities for measuring impact - *on an academic basis: this also gives us some credibility in that sense* (MentorArt).

To sum up, a purpose-fit measurement design enables social enterprises to translate evidence into credibility, contracts, internal learning, and marketable offers - all while protecting mission integrity. The aim of the framework is to bring to awareness the need for alignment of the measurement types to concrete organisational strategies and to the business-model forms they use, and to illustrate each link with empirical excerpts drawn from the field, in order to create a base of inspiration to social entrepreneurs.

Proposed Artifact

Figure 6 – The Social Entrepreneur's Playbook



Description of the Proposed Artefact

The Social Entrepreneurs' Playbook – An analysis-to-practice tool

The Social Entrepreneurs' Playbook is a framework designed to guide social entrepreneurs in navigating the complexity of the social sector. It differs from existing typologies and tools – which often focus on a single dimension, such as entrepreneur type (Zahra et al., 2009), organizational model (Michelini, 2012; Carayannis *et al*., 2021), or innovation frameworks (Unceta *et al*, 2016) – because it presents a global view of the social sector, by analyzing it in the main five dimensions. By synthesising these layers into a cohesive system, the Social Entrepreneurs' Playbook serves both as an **analytical tool** and as an **action-oriented guide** for entrepreneurs and social innovation practitioners seeking to design, implement, and scale socially innovative solutions.

1. Change Agents Dimension: Profiles of Social Entrepreneurs - The Playbook presents seven archetypes: Alternative Creators, Lived-Experience Advocates, Value-Driven Founders, "Skin in the Game" Managers, Methodical Innovators, Social Bricoleurs, and Civic Stewards. These extend Zahra et al.'s (2009) typology by integrating motivation, knowledge, and operational approach, providing a more nuanced understanding of entrepreneurial diversity in the social field.

2. Social Environment & Networks: Fit and Friction Framework - This dimension analyses micro, meso, and macro contexts, grounded in social sector nature theory (Santos, 2012). Its key contribution is the "fit and friction" concept, where social entrepreneurs adapt their networks in response to environmental conditions – through network strategy, entrepreneurs overcome constraints and leverage supportive contexts.

3. Social Innovation Typology:Organisational, Problem-Solving, Engagement - Building on an adaptation of the *Ten Types of Innovation*, the Playbook identifies seven forms of social innovation: Sustainability Model, Collaborative Network, Change Processes, Solution Performance, Solution System, Delivery Channels, and Legitimacy. These are organised into three categories: organisational, problem-solving, and engagement - bridging social innovation theory with practical strategic planning.

4. Social Business Model Archetypes - Drawing from Yunus et al. (2010) and other typologies, this dimension offers five actionable models: Fee-for-Service (B2C/B2B), Diversified Funding Mix, Partnership-Based Programs, Productized Income Streams, and Mission Safeguards. What differentiates the Playbook is its cross-dimensional approach—business models are not static structures but interconnected with innovation and environmental strategies, making them dynamic tools for scaling.

5. Impact Measurement & Strategies Interconnections

The final dimension links impact assessment with organisational strategy. Beyond reporting, it frames measurement as a means for diffusion, sustainability, and strategic positioning. By integrating proportional and fit-for-purpose evaluation methods, the Playbook ensures that impact is actively leveraged to strengthen legitimacy, attract resources, and enable replication.

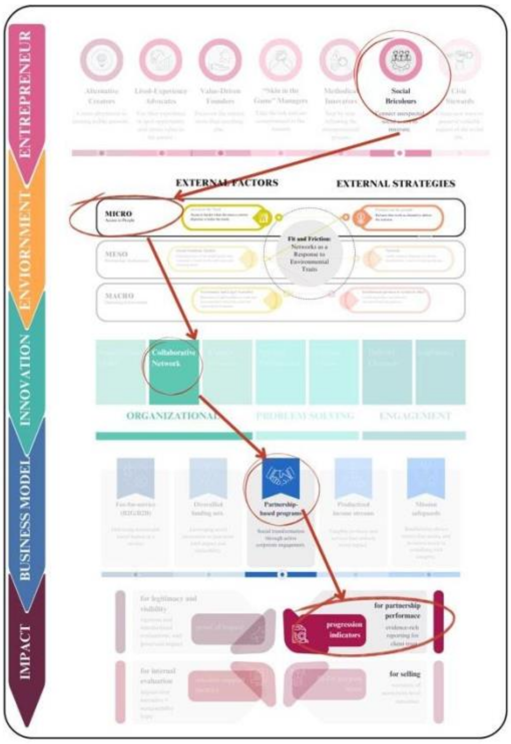
How to Use the Artefact:

Practical Guide of The Social Entrepreneurs' Playbook: Step-by-Step Use

Based on the patterns observed in the 20 cases, and drawing upon the categories and archetypes identified in the results and discussion, this final chapter proposes a practical tool – the Social Entrepreneur's Playbook. The Playbook is designed to translate analytical insights into actionable guidance, helping social entrepreneurs navigate the core dimensions of their ventures: opportunity recognition, innovation, business model configuration, partnerships, and impact measurement. Its purpose is therefore both synthesising academic findings and supporting practitioners who seek to build sustainable and impactful social enterprises.

The Social Entrepreneurs' Playbook is designed to function as a navigational map for social entrepreneurs, moving from self-identification to environmental alignment**,** innovation design**,** business model structuring**,** and impact measurement with operational strategy**.** <u>The process is iterative rather than linear</u>, allowing adaptation to evolving contexts and connections across the different dimensions.

Next, an example of how an entrepreneur may use the Playbook will be presented, navigating through all the dimensions and connecting them either for analysis purposes or for inspiration for his/her own practical work.



Step 1 – Identify the Entrepreneurial Profile

Entrepreneurs start with a self-diagnosis to determine which of the seven profiles matches their motivations, skills, and tendencies. However, the most important contribution of this dimension is to serve as inspiration for entrepreneurs and show how different profiles align with different approaches to the social market. Why does this matter? - Research shows that clarity on entrepreneurial orientation enhances strategic coherence and resilience in social ventures (Zahra et al., 2009).

Example: A founder using a creative approach from their background may identify as a Social Bricoleur.

Step 2 – Map the Environment at Micro, Meso, and Macro Levels

The next step is to analyse the ecosystem at all levels, identifying supportive conditions (fit) and constraints (friction). Network strategies—partners, advocacy coalitions, and alliances—are chosen to navigate these conditions.

Example: A Social Bricoleur will likely adopt a micro-level strategy by leveraging local human resources in their network.

Step 3 – Select the Social Innovation Type

With the environmental map in place, entrepreneurs can choose from different innovation types – by mixing two or more types of innovation from the Playbook's six types, and by getting inspired by the examples that each of these types carries.

Example: For a Social Bricoleur, the focus on the creation of the solution may be, to innovate at an organisational level, using the environmental resources to create a solution based on a collaborative network.

Step 4 – Choose and Tailor the Business Model

Here, entrepreneurs select one or a hybrid of the five business model archetypes, shaping scalability and financial resilience.

Example: Using local network resources, an entrepreneur may choose a business model that monetises its partnerships, such as the Partnership-based Programs Model.

Step 5 – Design Impact Measurement and Align it with Organisational Strategy

Impact measurement is treated as a strategic tool rather than only reporting. The entrepreneur aligns the measurement approach with organisational goals, considering all prior analyses to guide decisions on how and to whom outcomes should be communicated.

Example: When relying on partnerships, the entrepreneur aligns an impact measurement strategy to provide assurance to partners and build long-term trust—here, "*measuring for partnership performance*" is appropriate.

6. Conclusion

The main contribution of this study is the cross-dimensional analysis of social entrepreneurship, addressing five interrelated dimensions that emerged from exploratory research in the Portuguese social sector: entrepreneurial profiles, social environments and networks, types of social innovation, social business model archetypes, and impact measurement. The analysis of social entrepreneurs demonstrated roots that show mission-driven andemotionallyl fueled approaches, while entrepreneurial strategies ensure continuity and credibility. Importantly, it was understanding that all these entrepreneurs have an exit approach (when the solutions integrate the social system, extinguishing the initial problem), reflecting philosophies of how change should endure within society. Then, studying the environment of the social sector added valuable knowledge to the global conclusions of this dissertation. As suggested by Santos (2012), it was confirmed that context is not a passive backdrop but an active determinant of action, and this study shows that entrepreneurs constantly negotiate "fit" and "friction". The important thing was seeing how, in Portugal, municipal partnerships, cross-sector collaborations, and alliances within organisations are crucial mechanisms to overcome structural barriers and resource shortage. On the other hand, the creation and application of the adapted social innovation framework demonstrated that conventional tools, such as *Ten Types of Innovation*, require reinterpretation when applied to initiatives driven primarily by social impact rather than profit. The analysis validated Keeley's (2013) claim that successful innovators often combine multiple types of innovation, as many projects integrated more than one category in their strategies. At the level of business models, the findings reveal how innovating in the business models is key to thriving in the social market. The findings proved the creativity in the setting of models that will lead to the mission's achievement. Here, impact itself becomes the purchased service; scalability depends on productisation and transferability; resilience derives from diversified funding streams; and integrity is safeguarded by careful partnership design. As one interviewee noted, *business is not the end, it's the means* (ColorADD), underscoring how business mechanisms are not ends in themselves but enablers of mission advancement. As Santos (2012) and Peredo & McLean (2006) argue, social entrepreneurship's understanding requires frameworks that embrace the dual logics of financial viability and social transformation. Finally, findings demonstrate that impact measurement in the social sector extends beyond accountability and functions as a strategic asset for growth and legitimacy. Socialorganisationss in Portugal increasingly link measurement to decision-making, using evidence of outcomes to secure contracts, renew partnerships, and scale strategies.

Hopefully, this study has helped advance the field of social entrepreneurship by proposing *The Social Entrepreneurs' Playbook*, a framework that integrates five interconnected dimensions into a cohesive and actionable system. Its contribution lies not only in synthesising prior frameworks but also in adapting them to the distinctive logics of the social sector, where financial sustainability and social transformation must coexist.

Limitations of the Study

Despite its contributions, this study has several limitations that should be acknowledged. First, the research was conducted primarily within the Portuguese social sector, a relatively young and evolving ecosystem, which may limit the generalizability of the findings to more mature or structurally different contexts. Second, while the purposive sampling strategy ensured the inclusion of highly relevant cases, its conclusions are also limited by the number of project,– which allow interesting findings but not a solid conclusion of patterns in the social ecosystem.

Finally, on practical terms, this study was made under limited time (due to professional and personal constraints), which forced the limitation of certain research methods and testing of the frameworks. These limitations suggest the need for further empirical testing to validate the Playbook in different settings.

Contributions to the Field and Future Research

While previous studies often examined these elements in isolation (e.g. Michelini, 2012; Carayannis et al., 2021), this research demonstrates that their interconnections are essential for understanding how social ventures emerge, consolidate, and scale. By situating social entrepreneurship within a multidimensional framework, the study provides not only a more comprehensive theoretical understanding of the field but also a practical roadmap that reflects the realities faced by entrepreneurs operating in an evolving ecosystem. Theoretically, it enriches the field by providing a comprehensive and adaptive framework; practically, it functions as a "route-finder" for entrepreneurs, linking identity, context, innovation, business, and impact pathways into coherent trajectories for systemic change. Future research should further test and refine the Playbook across diverse geographies and institutional contexts. Additionally, exploring the integration of standardised impact measurement tools, such as Social Return on Investment (SROI), could strengthen the Playbook's operational utility.

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Appendix 1 – ***Literature Review – Critical Summary***

<table>
<tr><th></th><th>Article</th><th>Interpretation of the concept in the article</th><th>Literature Review of the Concept</th></tr>
<tr><td rowspan="3">History of Social Entrepreneurship</td><td>Almeida, 2024</td><td>First case of social entrepreneurship usually attributed to Florence Nightingale (1860) during the Crimean War, creating the service of nursing.</td><td rowspan="3">The history of social entrepreneurship raises questions about the definition of the concept. SE cases can be found from well back in time if we accept the definition of SE as pursuing social value through the implementation of entrepreneurial processes. The earliest case identified by SE theoreticians was the case of Mansa Musa in 1400's – the emperor of Mali that invested in the social growth of the communities. Although these initial cases lack much evidence on the use of social entrepreneurial models, they are still the first evidence of understanding community welfare through social impact strategies.</td></tr>
<tr><td>Hoove, 2018</td><td>Timeline: 1400 – Mansa Musa; 1500 – Renaissance civil relief; 1600 – corporations fueled growth; 1700 – Thomas Bond's hospital; 1800 – Rochdale Pioneers & Nightingale; 1900 – Vinoba Bhave & Ashoka;
2006 – B Labs.</td></tr>
<tr><td>Sophie Bacq, Wasieleski, & Weber, 2022</td><td>Began 1972 when Bill Drayton identified entrepreneurs leveraging market-based opportunities for social/environmental issues. Ecosystem matured with organizations like Echoing Green, Schwab, and Skoll Foundations.</td></tr>
<tr><td rowspan="4">Social Entrepreneurship</td><td>Peredo & McLean, 2006</td><td>SE as creation of social value via entrepreneurial processes: creation, opportunity recognition, innovation, risk tolerance, resourcefulness. Flexible definition.</td><td rowspan="4">The definition of social entrepreneurship (SE) depends on both the notion of mission and the notion of process simultaneously. In this sense, SE distinguishes itself from the aim of social value creation and is characterized by the use of entrepreneurial processes to achieve this previously identified goal. It still lacks here an idea mentioned by various authors about the mission of solving social problems and providing solutions to neglected challenges in society, some of which were created by the traditional entrepreneurship market. With this</td></tr>
<tr><td>Michelini, 2012</td><td>SE is a process/behavior: innovation rejuvenates or redefines organizations, markets, or industries to create competitive superiority. (Reference to Covin & Miles, 1999)</td></tr>
<tr><td>Phillips et al., 2015</td><td>SE pursues a social mission rather than economic goals, acting to create social value and financial return.</td></tr>
<tr><td>Singh, 2014</td><td>Application of entrepreneurship principles, tools, and processes to create social capital.</td></tr>
</table>

	Article	Interpretation of the concept in the article	Literature Review of the Concept
	Hoove, 2018	MovingWorlds Institute: SE based on business principles to sustainably solve social/environmental challenges via revenue streams.	in mind, social entrepreneurship can be defined as the creation of solutions for social challenges through the application of entrepreneurial and managerial processes in a way of creating social value.
	JG, Khanin, 2013	SE as a creator of solutions for market failures: overconsumption, underinvestment, and strategic behavior.	
	Murphy, 2013	Creation and undertaking of ventures promoting social purpose in a mobilization context.	
	Gugnani & Agrawal, 2014	Pursuit of social value creation via entrepreneurial activities to ensure financial sustainability.	
	Wilson & Post, 2011	Social businesses prioritize social missions alongside financial sustainability.	
	Santos, 2012	SE provides sustainable solutions to neglected problems, addressing market and government failures.	
Social Entrepreneurship vs	Gugnani & Agrawal, 2014	SE integrates social responsibility into business models, differentiating from profit-driven and nonprofit organizations.	Social entrepreneurship embodies a hybrid goal: addressing social problems while building financially and organizationally sustainable ventures (Walske et al., 2013). Although some debate arises when social enterprises pursue profit alongside impact, their success depends on entrepreneurs' ability to generate revenue. Recent discussions emphasize the challenge of innovating revenue
	Singh, 2014	Mission: social impact vs profit; Value Creation: social outcomes vs financial results; Funding: mixed vs sales; Market discipline; Stakeholders; Innovation; Social impact.	

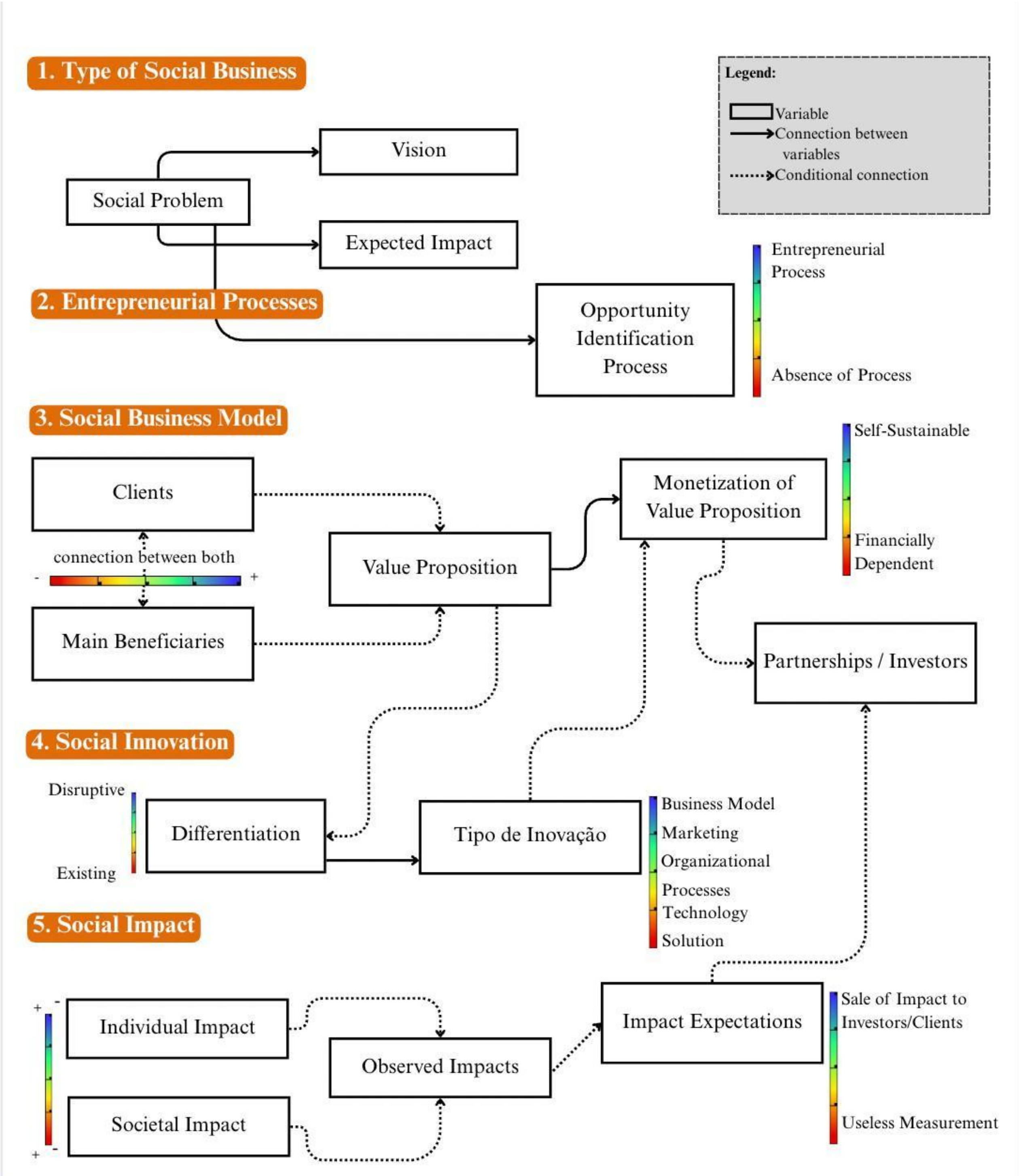
	Article	Interpretation of the concept in the article	Literature Review of the Concept
	Peredo & McLean, 2006	SE explicitly integrates social objectives even if unprofitable.	streams in a frugal social market without compromising the social mission.
	Santos, 2013	SE prioritizes value creation over profit; challenges applying traditional management models to SE.	
	Zacharakis, Walske, & Scarlata, 2013	SE succeeds if it impacts other SE, not competitive advantage.	
Social Business Models	Phillips et al., 2015	Collaboration between sectors enhances social innovation; entrepreneurs identify unmet needs.	It is a common belief that the Social Business Model (SBM) must be innovative and creative in its own essence to achieve sustainable solutions. While social entrepreneurs adapt traditional management practices, the social market's unique characteristics demand approaches beyond conventional methods. Key patterns include identifying opportunities in underserved environments, mobilizing resources, defining activities for value creation and delivery, and, critically, building strategic networks of stakeholders and partnerships. Effective collaboration can take various forms—cross-sectoral, profit–nonprofit, public–private, or even target-group-led—with some advocating the quadruple/quintuple helix model, but consensus emphasizes that mapping and leveraging relevant networks is essential for social impact.
	Carayannis et al., 2021	SE follows quadruple/quintuple helix innovation models.	
	Michelini, 2012	SBM framework: 7 areas, 13 components (offer, market, governance, ecosystem, surplus, economic & social value equations).	
	Huddart, 2010	Cross-collaboration between profit and nonprofit markets guides social business development.	
	Murphy, 2013	Mobilization requires combination of economic, environmental, and social resources; timing is crucial.	
	Kruger, 2013	Business model evolution is more important than the model itself. Making testing/pivots it's key for successful social business models.	
	Letts et al., 2004	Service dissemination and stakeholder networks are what scale solutions.	

	Article	Interpretation of the concept in the article	Literature Review of the Concept
	Gugnani & Agrawal, 2014	Public-private partnerships essential for addressing complex social problems.	
	Mair & Schoen, 2005	Social entrpreneurship creates own value networks; evolves target group into value network early.	
	Komatsu Cipriani et al., 2016	Patterns: link conflicting assets, divergent environments, multi-actor strategies, frugal solutions/bricolage.	
	Alegre & Berbegal-Mirabent, 2016	Value proposition, market research, stakeholder involvement; social pressures and culture foster innovation.	
	Wilson & Post, 2011	Ownership model prioritizes shareholders; market-based approach merges business practices with social missions.	
	Yunus et al., 2010	Grameen Bank model: value proposition, value constellation (stakeholders), profit equation (self- sustainability, reinvestment).	
Social Innovation	Phillips et al., 2015	SE develops ideas (products, services, models) addressing social needs to improve well-being.	The concept of social innovation can be easily understood by itself, but it refers to a revolutionary way of thinking about social problems. Social innovation represents a transformative approach to addressing social problems, aiming to create solutions rather than gain competitive advantage. Unlike traditional market innovation, it requires context-sensitive methods, continuous adaptation, and active stakeholder involvement. Some scholars propose specific metrics to ensure effectiveness, reflecting the distinct, socially driven nature of innovation and the need for solutions that evolve with societal changes.
	Huddart, 2010	Principles of social innovation: strategic intent, adaptability, collaboration, empowerment, technology leverage.	
	Unceta et al., 2016	RESINDEX: indicators to measure social innovation – exploration, exploitation, evaluation, participation/cooperation.	
	Phillips et al., 2015	Social Innovation Systems: networks collaboratively solving social problems.	

	Article	Interpretation of the concept in the article	Literature Review of the Concept
	Gugnani & Agrawal, 2014	Continuous innovation critical for SE relevance.	
Self-Sustainability	Walske et al., 2013	Hybridity: dual goals – financially sustainable enterprise + solving social problems.	Social entrepreneurship embodies a hybrid goal: addressing social problems while building financially and organizationally sustainable ventures (Walske et al., 2013). Although some debate arises when social enterprises pursue profit alongside impact, their success depends on entrepreneurs' ability to generate revenue. Recent discussions emphasize the challenge of innovating revenue streams in a frugal social market without compromising the social mission.
	Gugnani & Agrawal, 2014	Profit for purpose: profits support social missions; financially sustainable innovation.	
	Wilson & Post, 2011	Earned income supports operational costs and social mission.	
Social Entrepreneur	Michelini, 2012	Social Entrepreneur as founder, initiating social mission with dynamism and innovation.	If social entrepreneurship is a process, the social entrepreneur is the mission. It is the person who carries the responsibility of creating social impact and applies the entrepreneurial process to achieve its goal. In contrast to traditional entrepreneurship, here the entrepreneur is seen as a vehicle for the mission – the mission is not their creation but something that they assume as their responsibility. Among social
	Phillips et al., 2015	Entrepreneurs drive social missions and navigate resources/challenges in developing social innovations.	
	Drayton, 2022	Term "changemakers" defines individuals spreading social impact; Ashoka promotes global change-making.	

	Article	Interpretation of the concept in the article	Literature Review of the Concept
	Zahra et al., 2009	Social entrepreneurs is a diverse universe: (1) Social Bricoleurs – local, responsive; (2) Social Constructionists – systemic problems; (3) Social Engineers – disrupt existing systems.	entrepreneurs that are also variants in profiles that differ in scope, method, and ambition.
Social Enterprise	Huddart, 2010	B Corporations: for-profit companies also working for nonprofit ends.	The term "social enterprise" varies in meaning across the literature. Some argue any company applying social entrepreneurship principles qualifies, while others insist it must follow a non- profit or mission-first model (Huddart, 2010). Hybrid forms, like B Corporations, which combine social impact with profitability, are also recognized as part of the evolving field. In Portugal, although no formal "social enterprise" status exists, Ferreira (2022) identifies diverse organizational forms emerging to address unmet social needs, reflecting the creativity and adaptability of the social sector
	Michelini, 2012	Social enterprise as tangible outcome of SE; corporate SE applies to business sector.	
	Ferreira, 2022	Identifies five SE types in Portugal: (1) social cooperatives & mutualities; (2) enterprising non- profits; (3) work integration enterprises; (4) social solidarity economy enterprises; (5) social business ventures.	

Appendix 2 - ***Categorisation of the variables for analysis***



Appendix 3 – **Interview Guide**

0. Equadramento

0.1. Qual o nome do negócio/projeto?
0.2. Há quanto tempo existe este negócio/projeto?
0.3. Quem o fundou?
0.4. Pode-nos contar de forma resumida a história do negócio/projeto desde o início até ao momento?

1. Tipo de Negócio Social

1.1. Qual é o principal problema social que o seu negócio/projeto aborda?
1.2. Qual é a natureza social desse problema (ex.: educação, saúde, meio ambiente)?
1.3. Pode descrever a sua visão social e o impacto a longo prazo que espera alcançar?

2. Processos Empreendedores

2.1 Como identificou esse problema como uma prioridade?
2.2 As pessoas envolvidas no problema identificado são também envolvidas no desenvolvimento e implementação da solução através do vosso negócio/projeto? Como?
2.3 Pode explicar como a solução é implementada e sustentada dentro do grupo-alvo?
2.4 Que desafios enfrentou ao escalar ou ao sustentar a sua solução?

3. Inovação Social

3.1. Considera o seu negócio/projeto inovador dentro do mercado de soluções sociais? Porquê?
3.2. Que tipo de inovação diria que o seu negócio segue? - É ao nível do modelo de negócio ou da solução que apresenta?

4. Modelo de Negócio Social

4.1. Quem são os principais beneficiários e quem são os clientes? *Sendo que aqui estamos a considerar como beneficiários aqueles a quem a solução resolve um problema que sentem, e clientes as pessoas que constituem a fonte de receitas.*
4.2. Qual é a proposta de valor do negócio/projeto?
4.3. E qual a estratégia financeira aplicada? E como é que garante a sustentabilidade do negócio/projeto?
4.4. Pode descrever as principais parcerias e redes de apoio que sustentam o seu negócio?

5. Impacto Social

5.1. Como considera que o seu negócio/projeto afeta a vida das pessoas e a sociedade em geral?
5.2. Que impactos mensuráveis já observou até agora?
5.3. Que tipo de perspetivas ou oportunidades o negócio gera para investidores?
5.4. Quais são seus objetivos futuros para aumentar o impacto social?

Appendix 4 - **The sample: the projects from the interviewed organisations**

Project	**Type of Organisation**	**Age (Years)**	**Story**
1. Just a Change	IPSS	15	Renovates homes of people in house-poverty situations. Uses volunteer work and corporate partnerships for sustainable revenue.
2. Walking Football	Private social project	7	Promotes active ageing through walking football across Portugal. Provides training, professional capacity building, and national gatherings.
3. Fundação Lar Nossa Senhora do Livramento	Social Institution	5	Supports young girls in a foster house for total social integration, securing top schools. Trains staff to co-create a transformative pedagogical model.
4. Mais Natal Priscos	Public institution's project	N/A	Integrates prisoners in the construction of a local event - earning saved salaries. Promotes rehabilitation and social reintegration through meaningful work.
5. Aldeia de Pontemieiro	Association	17	Revitalises a small village through events and tourism. Attracts visitors and builds community via local networks and creative promotion.
6. Movimento Transformers	Youth association	14	Promotes civic engagement through youth mentorship for social inclusion and sells programs to municipalities nationwide.
7. IES – Social Business School	School	17	Trains social entrepreneurs and provides consulting. Acts as a hub for Portugal's social innovation ecosystem and spin-offs.
8. GirlMOVE	NGO	12	Empowers young women from Mozambique through education, leadership, and internships, in order to create changemaker leaders in their communities.
9. Color ADD	Social enterprise	13–15	Helps colorblind individuals identify colors via a simple visual code. Widely adopted in products worldwide, using an effective business model.
10. CIS Porto	Municipal initiative	14	Supports entrepreneurs and intrapreneurs with innovation labs. Promotes social entrepreneurship, organisational change, and civic participation.
11. META	Youth Association	<1	Builds a self-sustaining youth mentorship solution for young people in foster homes. Encourages peer support and continuity beyond formal programs.

Project	Type of Organisation	Age (Years)	Story
12. Associação Unificar	Association	12–13	Prevents risky behaviours and promotes social reintegration. Trains educators and psychologists in socio-emotional development programs.
13. Inclusion4you	Social service enterprise	2	Provides consultancy, training, and events to improve accessibility. Promotes equity, inclusion, and independent living for diverse groups.
14. Social Innovation Sports	Non-profit association	3–4	Uses sports to foster social inclusion and integration. Runs community programs promoting engagement.
15. MentorART	Non-profit	3	Connects university students and young professionals with children in vulnerable contexts. Provides mentorship to boost ambitions and social-emotional development.
16. LongeVidade	Social Solidarity Cooperative	3	Supports active ageing and quality of life for retirees and older adults. Offers personalised services to meet diverse needs and preserve people's autonomy.
17. Pedalar Sem Idade	Association	5	Volunteers give free rides on adapted vehicles to elderly and mobility-impaired people. Reduces social isolation while promoting engagement.
18. IRIS	Social Innovation Incubator	6	Incubates projects offering innovative solutions to social problems. Trains social entrepreneurs and organisations in the innovation field.
19. Mudar o Mundo	Educational Program	6	Engages children in creative problem-solving for social and environmental challenges. Develop training for educators.
20. VERDE	Association	3	Promotes nature conservation through environmental research, and private entities' consulting and carbon footprint compensation.

Appendix 5 – ***Social Innovation Proposed Framework Analysis***

	HOW…		WHO…
ORGANIZATIONAL	**Sustainability Model**	The organizations that innovate in their financial model, were the ones that were able to find a way of being sustainable in the social market. In the case of Just a Change, their model concerns in selling the solution to companies in the format of team-budlings. Walking Football's model, one the other hand, is tied to their capacity of reducing costs and making it attractive to entities to invest in it. And Mudar o Mundo, can guaranty more sustainability then other social organizations because they were able to create a product that they can easily sell.	Just a Change; Walking Football Portugal; Mudar o Mundo.pt
ORGANIZATIONAL	**Collaborative Network**	The capacity to create a good network for collaboration is key to social organizations and it will be talked in more detailed at a next chapter. The best example of this is, without a doubt, the GirlMove organization that is able to connect people from different countries to help the girls of one city in Africa.	GM Academy; Fundação Lar Nossa Senhora do Livramento
ORGANIZATIONAL	**Change Processes**	The change processes type of innovation was the main type of innovation in the social sector, that was identified in this study. It is reasonable to think that these organizations thrived among a variety of long-term existing social answers because, in the basis, they found a way of "doing it better" and, by doing so, delivering a higher social impact.	mentorART o programa; Presépio ao Vivo de Priscos; GM Academy; Aldeia Dropi
PROBLEM SOLVING	**Solution Performance**	These organizations distinguish themselves in the social sector, mainly because they appeared with solutions that were never seen before. Often it was possible to understand that these creations came from trying to get around the existing solutions and create new paths that would generate more impact. Even if now, others have appeared doing similar "social jobs", they were the ones that showed society new ways of solving their problems.	Inclusion4You; ColorADD; Pedalar sem Idade Portugal; CIS Porto Centro de Inovação Social; Longevidade; projeto meta; Just a Change
PROBLEM SOLVING	**Solution System**	The solution system is an important type of innovation in the social market, because it often is generated to answer a problem in its totality. This type of innovation is connected with the capacity of connecting or bundling together different solutions to create a robust and scalable system that answers the need.	Walking Football Portugal; Inclusion4You; Fundação Lar Nossa Senhora do Livramento; Social Innovation Sports
ENGAGEMENT	**Delivery Channels**	These are the innovative traits of a project that make a solution easier to be implemented, used, and enjoyed; they reveal functionality that beneficiaries might otherwise overlook; and they fix problems in the beneficiary journey.	mentorART o programa; IES Social Business School; AU Associação Unificar
ENGAGEMENT	**Legitimacy**	In this study we could find some organization whose brands were the reference brand in that sector market. In these cases, the stories of the organizations were both marked by amount of experience in the sector and careful strategical growth over the years of scaling.	ColorADD; IES Social Business School