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(EN) Transformational and Visionary Leadership in Social Entrepreneurship: Building from Zero to Create Social Wealth and a Sustainable Future in Europe

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"Acknowledgents and / or Dedication"

I would like to thank my family for the support in this journey and encouraging me to complete the present work.

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Abstract

In an era marked by complex global challenges (social, environmental, and economic), new forms of entrepreneurship are emerging that combine profit with purpose. Social entrepreneurship represents a transformative model that not only addresses pressing social needs but also promotes sustainability and collective wellbeing. At the heart of this transformation lies leadership, particularly transformational leadership with strong vision, which empowers individuals to begin with minimal resources, align their personal skills with a social mission, and mobilize others toward a shared vision of societal improvement. This dissertation explores how such leadership behaviors, values and practices make it possible to create impactful social ventures and contribute to social wealth and a sustainable future in Europe. The research includes a literature review on leadership and social entrepreneurship and qualitative interviews with social enterprise leaders across European countries. The aim is to identify the leadership values, behaviors and practices that enable founders to move from ideas toward sustainable enterprises that generate, alongside economic value, social impact. The findings are expected to provide insights into how leadership can act as a catalyst for innovation, empowerment, and long-term societal transformation.

Keywords

Social entrepreneurship; Early-stage entrepreneurship; Transformational leadership; Visionary leadership; Emergent leadership; Social wealth; Human capital; Social capital; Innovation; European context.

Περίληψη

Σε μια εποχή που χαρακτηρίζεται από σύνθετες παγκόσμιες προκλήσεις (κοινωνικές, περιβαλλοντικές και οικονομικές), αναδύονται νέες μορφές επιχειρηματικότητας που συνδυάζουν το κέρδος με τον κοινωνικό σκοπό. Η κοινωνική επιχειρηματικότητα αποτελεί ένα μετασχηματιστικό μοντέλο που όχι μόνο ανταποκρίνεται σε επείγουσες κοινωνικές ανάγκες, αλλά προάγει επίσης τη βιωσιμότητα και τη συλλογική ευημερία. Στο επίκεντρο αυτής της μεταμόρφωσης βρίσκεται η ηγεσία, ιδίως η μετασχηματιστική ηγεσία με ισχυρό όραμα, η οποία δίνει τη δυνατότητα στα άτομα να ξεκινήσουν με ελάχιστους πόρους, να ευθυγραμμίσουν τις προσωπικές τους δεξιότητες με μια κοινωνική αποστολή και να κινητοποιήσουν άλλους προς ένα κοινό όραμα κοινωνικής βελτίωσης. Η παρούσα διατριβή διερευνά πώς τέτοιες ηγετικές συμπεριφορές, αξίες και πρακτικές καθιστούν δυνατή τη δημιουργία κοινωνικών επιχειρήσεων με αντίκτυπο και συμβάλλουν στον κοινωνικό πλούτο και σε ένα βιώσιμο μέλλον στην Ευρώπη. Η έρευνα περιλαμβάνει βιβλιογραφική ανασκόπηση σχετικά με την ηγεσία και την κοινωνική επιχειρηματικότητα, καθώς και ποιοτικές συνεντεύξεις με ηγέτες κοινωνικών επιχειρήσεων σε διάφορες ευρωπαϊκές χώρες. Στόχος είναι να προσδιοριστούν οι αξίες, οι συμπεριφορές και οι πρακτικές ηγεσίας που επιτρέπουν στους ιδρυτές να μετατρέψουν τις ιδέες τους σε βιώσιμες επιχειρήσεις που παράγουν, παράλληλα με οικονομική αξία, και κοινωνικό αντίκτυπο. Τα ευρήματα αναμένεται να προσφέρουν πληροφορίες σχετικά με τον τρόπο με τον οποίο η ηγεσία μπορεί να λειτουργήσει ως καταλύτης για την καινοτομία, την ενδυνάμωση και τη μακροπρόθεσμη κοινωνική μεταμόρφωση.

Λέξεις – Κλειδιά

Κοινωνική επιχειρηματικότητα, Πρώιμο στάδιο επιχειρηματικότητας, Μετασχηματιστική ηγεσία, Οραματική ηγεσία, Αναδυόμενη ηγεσία, Κοινωνικός πλούτος, Ανθρώπινο κεφάλαιο, Κοινωνικό κεφάλαιο, Καινοτομία, Ευρωπαϊκό πλαίσιο.

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List of Abbreviations & Acronyms

4Is – Four Components of Transformational Leadership (Idealised Influence, Inspirational Motivation, Intellectual Stimulation, Individualised Consideration)

EMES – Emergence of Social Enterprises in Europe Research Network

EU – European Union

GEM – Global Entrepreneurship Monitor

HOU – Hellenic Open University

MBA – Master of Business Administration

MLQ – Multifactor Leadership Questionnaire

MOOCs – Massive Open Online Courses

RQ – Research Question

SDGs – Sustainable Development Goals

SE – Social Enterprise

WEF – World Economic Forum

1. Chapter 1 - Introduction (broad overview of the research and literature)

PART A – Overview of the research

1.1. Background

Social entrepreneurship has gained substantial momentum in recent decades as a response to persistent global social, economic, and environmental challenges that traditional market and policy mechanisms have struggled to address (Borzaga et al., 2020, p. 2024; World Economic Forum, 2024). For much of the modern era, mainstream business models have prioritised financial gain over social wellbeing, often externalising the human and ecological costs of growth. Simultaneously, public institutions, constrained by bureaucracy, limited resources, or policy inertia, have struggled to respond effectively to emerging needs. As these systemic limitations became increasingly evident, communities began seeking alternative approaches to organising economic activity, ones capable of balancing financial sustainability with societal benefit. This shift in expectations created fertile ground for the rise and recognition of social entrepreneurship.

Social enterprises integrate market-based activities with missions of social value creation, balancing economic performance with societal benefit (Borzaga et al., 2020; Dees, 2001; Sottini et al., 2025). Their defining characteristic is the reinvestment of surpluses into their mission, enabling them to address unmet needs while maintaining financial viability. In many regions, they have become important contributors to employment, local development, and community resilience. Social enterprises frequently emerge through grassroots, bottom-up mobilization, as citizens organize to address unmet needs not adequately served by public authorities or market actors (Borzaga et al., 2020; Teasdale et al., 2023). Rooted in community realities, these initiatives often deliver solutions with greater local relevance and long-term legitimacy (Borzaga et al., 2020).

While the roots of social entrepreneurship can be traced back to earlier traditions of community solidarity, cooperativism, and volunteer-driven initiative (Borzaga et al., 2020), contemporary social entrepreneurship distinguishes itself through its entrepreneurial logic. Modern social entrepreneurs go far beyond charitable relief. They act as change agents who seek to address the root causes of social problems by identifying unmet needs, designing innovative interventions, and creating new business models capable of generating sustainable social value (Alvord H. et al., 2003; Dees, 2001; Fernández-Guadaño & Diez, 2023). Rather than applying temporary fixes, they experiment with novel service delivery approaches, build new social arrangements, and creatively combine resources to respond to complex societal challenges (Alvord H. et al., 2003; Teasdale et al., 2023). Their initiatives often aim for measurable and lasting impact, introducing solutions that challenge existing institutional arrangements and open pathways for deeper structural change.

However, the journey of establishing and scaling a social enterprise is widely recognised as complex. Social entrepreneurs often operate under conditions of resource scarcity, uncertainty, and fragmented institutional support (Borzaga et al., 2020; Dees, 2001). They frequently navigate the intersection of competing demands, balancing a strong social mission with the need to ensure economic sustainability (Defourny & Nyssens, 2010; Gupta et al., 2020). Many founders begin with limited resources and formal support, engaging with community dynamics, regulatory variation, and funding constraints within diverse European ecosystems (Borzaga et al., 2020). In these conditions, having an innovative idea is rarely enough. As Dees (2001) notes, social entrepreneurs succeed when they can act as change agents who mobilise the resources needed to pursue their mission. This depends on leadership capacity rather than creativity alone. Effective leaders influence and motivate others to commit to shared goals (Northouse, 2019), and they build the social arrangements and partnerships that make implementation possible (Alvord H. et al., 2003). Evidence also suggests that the ability to engage others and delegate effectively is often what distinguishes social enterprises that grow from those that remain small (Heinecke et al., 2014).

This is where leadership emerges as a decisive factor. Unlike traditional managerial roles, leadership in social entrepreneurship requires navigating dual logics: social purpose and economic viability. It demands the ability to build trust, cultivate shared commitment, and align diverse stakeholders around a meaningful vision. Social entrepreneurs must often lead under high uncertainty and without the conventional incentives available to for-profit ventures. Their influence depends heavily on personal credibility, ethical grounding, and relational skills, as effective leaders inspire voluntary engagement by acting as trusted role models and motivating others toward shared goals (Alvord H. et al., 2003; Heinecke et al., 2014; Northouse, 2019).

Among the various leadership theories, transformational leadership aligns particularly well with the realities of social entrepreneurship. Transformational leaders articulate a compelling vision, inspire intrinsic motivation, encourage innovation, and foster commitment beyond transactional incentives. They challenge existing assumptions, promote new ways of thinking, and empower others to contribute creatively to shared goals. These qualities are not merely advantageous; they are often essential for social entrepreneurs who must mobilise communities, attract mission-aligned talent, and sustain momentum in resource-constrained contexts. Transformational leadership helps convert individual conviction into collective action by motivating and influencing others, allowing founders to navigate the uncertainty of early-stage development and steer their organisations toward long-term sustainability (Heinecke et al., 2014; Hillyer & Savu, 2022; Northouse, 2019).

Furthermore, transformational leadership supports the creation of organisational cultures that prioritise learning, collaboration, and shared purpose (Northouse, 2019). Such cultures are particularly relevant in social enterprises, where the mission cannot be pursued through directive or hierarchical methods alone (Heinecke et al., 2014). Instead, leaders must cultivate environments where people feel valued, empowered, and connected to the social impact they aim to create. This leadership approach aids not only in organisational formation but also in scalability, resilience, and the generation of systemic impact (Hillyer & Savu, 2022).

Ultimately, social entrepreneurship seeks to produce lasting social wealth enhancing wellbeing, strengthening community structures, and contributing to systemic transformation (Borzaga et al., 2020; Dees, 2001; Roger L. & Osberg, 2007). Understanding how leadership shapes these outcomes is crucial to explaining why some social enterprises thrive while others falter under similar constraints. This thesis positions leadership, and specifically transformational leadership, at the core of the analysis to explore how certain founders are able to successfully initiate impactful social enterprises despite operating in highly challenging and uncertain environments.

1.2. Problem discussion

As discussed, the world has entered a state and age of polycrisis, whereby climate change, inequality, conflict and many other global chall enges are derailing progress towards the Sustainable Development Goals (World Economic Forum, 2024). Across Europe, social enterprises are increasingly emerging as grassroots responses to pressing social, environmental, and economic challenges. They often arise where public authorities lack capacity, where market incentives overlook vulnerable groups, or where institutional inertia fails to address urgent local issues. As a result, social enterprises frequently become the mechanism through which communities mobilise to meet unmet needs, experiment with alternative service delivery models, and pursue forms of value creation that prioritise wellbeing, empowerment, and sustainability.

However, while their presence is expanding, success during the early stages of a social enterprise's development remains difficult to achieve and even harder to understand. Unlike commercial startups, social enterprises typically begin with minimal financial resources, limited organisational structures, and uncertain or fragmented support ecosystems. Their emergence is closely tied to the specific realities of the communities that create them, including local histories, cultural norms, informal networks, and place-based challenges (Borzaga et al., 2020; Defourny & Nyssens, 2010). This strong contextual embeddedness makes social enterprises effective at addressing local problems, but it also renders them highly diverse, difficult to compare, and challenging to generalise across settings (Gupta et al., 2020; Teasdale et al., 2023).

Because each social enterprise reflects the particular needs and constraints of its community, the field lacks consolidated knowledge about what enables some early-stage ventures to move from idea to operational reality. As Hillyer & Savu (2022) note, "the scaling of social enterprises is one of the least understood processes of social entrepreneurship… the literature offers little insight into the organisational capabilities and leadership factors needed in the early stages much of the existing research focuses either on conceptual definitions, social innovation processes, or case-specific success stories". Most analyses to date have focused on mapping the conceptual evolution and maturity of social entrepreneurship research rather than empirically examining how social enterprises emerge and develop in practice (Sassmannshausen & Volkmann, 2016). What is not yet well understood is how founders manage the earliest, most fragile phase of the entrepreneurial journey: the moment when a social mission exists but the organisation does not; when resources are scarce, uncertainty is high, and legitimacy must be built from zero.

In this early stage, founders cannot rely on established structures, formal authority, or stable revenue models. Instead, as Dees (2001) highlights, social entrepreneurs often act boldly despite having limited resources, and their progress depends on mobilising others rather than relying on formal power. Northouse (2019) reinforces this by defining leadership as a process of influence rather than authority. Consequently, a founder's ability to move an initiative forward rests on their capacity to mobilise people, build trust, inspire commitment, and articulate a vision that others are willing to support voluntarily. This places leadership, and particularly transformational leadership, with its strong visionary component, at the centre of the startup process. Transformational leadership enables individuals to communicate an engaging purpose, create belief in the mission, mobilise stakeholders, and sustain motivation in the face of early-stage obstacles.

Social enterprises, by contrast, often operate informally at the outset, rely on relational trust rather than hierarchy, and must build legitimacy without the supporting mechanisms available to commercial ventures. These contextual differences mean that leadership models developed for traditional businesses cannot simply be transferred to the social enterprise setting. As Almandoz and Lee (2022) emphasize, despite the abundance of leadership advice in conventional corporate contexts, there remains a prevailing need for a comprehensive model of leadership specifically tailored to the multidimensional reality of social enterprises.

Furthermore, research on social entrepreneurship often focuses on outcomes - innovation, intended social impact, or system-level change promoted, rather than on the foundational behaviours and mindsets that allow a social entrepreneur to initiate the venture in the first place. Even when leadership is mentioned, studies tend to highlight broad characteristics (e.g., being mission-driven or value-oriented) without clarifying how these leadership behaviors translate into concrete actions during the uncertain startup phase. As a result, the field lacks an integrated understanding of how leadership operates at the earliest moments of organisational formation.

This gap has practical and theoretical implications. Practically, early-stage social entrepreneurs often operate alone or with minimal support and understanding what helps them navigate uncertainty could inform training, capacity-building, and ecosystem development initiatives. Theoretically, identifying the leadership behaviours and practices that enable founders to initiate and stabilise new social ventures contributes to more complete models of social entrepreneurship, models that begin not from established organisations but from the first steps that make those organisations possible.

For these reasons, this thesis focuses on leadership as the “starting brick” of a social enterprise. It seeks to understand how transformational leadership, particularly with strong visionary elements, enables founders to begin from zero, mobilise people and resources around a mission, and lay the foundations for sustainable social impact. By examining leadership in the earliest phase of social entrepreneurship across European contexts, this study aims to illuminate the leadership behaviours, values, and practices through which individuals convert an idea into a functioning social enterprise. In doing so, it addresses a meaningful gap in the literature and contributes to a deeper understanding of how leadership processes catalyse social value creation from the ground up.

1.3. Research purpose

The purpose of this research is to investigate how leadership, in specific transformational visionary leadership, can enable the emergence of social enterprises from the earliest stages of development. Despite social enterprises increasingly appearing across Europe as community-driven responses to unmet social needs, there has not been a lot of attention given to the specific leadership behaviours and values that enable founders to begin despite having minimal resources and to transform an idea into an operational venture. For that reason the dissertation study centers around addressing this gap by examining leadership dynamics associated with early-stage social entrepreneurship and assessing their relevance across diverse local contexts.

RQ1:
What leadership behaviours and values, particularly those associated with transformational and visionary leadership, enable founders to initiate social enterprises from minimal resources, and how are these elements enacted across diverse local contexts?

As a second goal, this dissertation aims to also explore how early-stage leadership practices contribute to the creation of social wealth. Within the study, the social wealth is perceived and analysed mainly in terms of community capability-building-such as education, skills development, and training initiatives that enhance collective wellbeing. It is a targeted analysis of the ways that founders mobilise people, build trust, and establish initiatives generating educational and developmental benefits, that this thesis aims to achieve and reveal the pathways through which leadership enables social enterprises to produce positive societal outcomes.

RQ2:
How do early-stage leadership practices contribute to the creation of social wealth, particularly through community education, training, and capability-building initiatives?

1.4. Delimitations

This dissertation focuses on early-stage social entrepreneurship, and it does not study the full organisational life cycle. The main interest lies in understanding how founders navigate the formative stage, meaning the transition from idea to initial operation, when resources and structures are minimal. However, such early-stage social enterprises can be hard to identify and approach due to their state of uncertainty, or even due to the lack of an official launch. For this reason, not only early start-ups but also more mature social enterprises were contacted (with presence already several years) and the participants in the study were asked to reflect retrospectively on their startup phase.

Then, the study is geographically delimited to European contexts. Despite the literature having a global character and allowing to shape a holistic conceptual background, the study has ben carried out within the European area (specifically Greece and Portugal). Therefore, the findings of the study, despite being crosss-analysed, may still not be directly transferable to global settings.

Another delimitation, is that the study focuses on the leadership enacted by the founders during the initiation phase, and not during more mature stages where processes and formality can take place and have leadership development initiatives, formal managerial structures, or team-level leadership. Thus, other kind of organisational influences, such as funding ecosystems, legal forms, or market conditions, are acknowledged but not analysed in depth.

One more delimitation concerns the social wealth, the examination of which is narrowed down to community capability-building, particularly education, training, and skills development. Broader or macro-level definitions of social wealth, such as environmental capital or national welfare indicators are not considered in this study.

Finally, the research methodology aims to provide rich qualitative results that are rooted in leaders real experience and grounded in the context of social enterprises early initiation, and not quantitative general data that would prevent an in depth analysis.

PART B - Literature review

1.5. Social entrepreneurship

1.5.1. Definition of social entrepreneurship

The defining element of social entrepreneurship and what distinguishes it from conventional entrepreneurial activity is the primacy of its social mission. Social enterprises prioritise the creation of social value over profit generation; although financial returns may arise, they are treated primarily as a means of advancing the organisation’s mission. Many social enterprises also incorporate mechanisms such as profit distribution limits to safeguard mission integrity and prevent the diversion of resources away from social objectives (Borzaga et al., 2020).

Dees (2001), one of the most influential early theorists in the field, conceptualises social entrepreneurs as “change agents” in the social sector who adopt a mission to create and sustain social value, recognise and pursue opportunities aligned with that mission, engage in continuous innovation and learning, act boldly despite limited resources, and maintain heightened accountability to their constituencies. Carlson (2022) extends this definition by highlighting three additional themes that frequently characterise social entrepreneurs: a focus on society's most pressing social problems, a commitment to generating ideas capable of producing change at scale, and the use of practical, innovative and sustainable approaches. Martin and Osberg (2007) further distinguish social entrepreneurship from commercial entrepreneurship by arguing that while commercial entrepreneurs design value propositions for paying markets, social entrepreneurs aim for "large-scale, transformational benefit" for significant segments of society rather than financial returns for investors.

A comprehensive understanding of social entrepreneurship also requires recognising the foundational thinkers and practitioners who shaped the field. Bill Drayton, founder of Ashoka in 1980, is widely credited with introducing and popularising the term *social entrepreneur*, framing these individuals as changemakers capable of devising innovative solutions to entrenched social problems (Drayton, 2006). Muhammad Yunus and the Grameen Bank demonstrated the transformative potential of entrepreneurial approaches to poverty alleviation; the award of the 2006 Nobel Peace Prize significantly increased global visibility and legitimacy for the field (Yunus, 2008). Dees (2001) provided the first widely accepted academic conceptualisation, while Martin and Osberg (2007) clarified the boundaries of the concept and distinguished it from related forms of social action. Within Europe, the EMES tradition, particularly the work of Defourny and Nyssens (2010), established a complementary framework emphasising democratic governance, solidarity and the hybrid nature of social enterprise models. Together, these perspectives form the conceptual foundations upon which contemporary definitions of social entrepreneurship rest.

Clarifying the concept further requires defining social enterprises as organisational forms. A widely accepted European perspective conceptualises social enterprises as hybrid organisations operating at the intersection of three core dimensions: an entrepreneurial dimension, a social dimension, and a participatory governance dimension (Borzaga et al., 2020). This framework highlights that social enterprises engage in economic activity and apply entrepreneurial competencies such as identifying opportunities and transforming ideas into value while remaining driven by an explicit social mission. Their operational models differ from conventional commercial ventures: social enterprises typically mobilise diversified resource mixes that include voluntary work, donations, grants and earned income, whether derived from market exchanges or public-service contracts (Borzaga et al., 2020). Across these variations, what consistently distinguishes social enterprises is their explicit aim of serving a community or specific beneficiary group, anchoring their entrepreneurial activity in public-purpose objectives.

1.5.2. Historical appearance and evolution of social entrepreneurship

Although the term social entrepreneurship became prominent in academic literature only in the late twentieth and early twenty-first centuries (Gupta et al., 2020; Sassmannshausen & Volkmann, 2016; Teasdale et al., 2023), its underlying practices have significantly deeper historical roots. Long before the concept was formally defined, communities developed collective mechanisms such as cooperatives, mutual-aid groups, philanthropic associations and voluntary organisations, to respond to unmet social needs. These early forms represented mission-driven, community-based responses to social problems, and in many European countries they formed the institutional and cultural foundations upon which modern social enterprises were later developed (Borzaga et al., 2020).

Early Roots: Civic, Cooperative and Mutual-Aid Traditions

Historically, social problem-solving often emerged from civic innovation with community actors working "outside of, but alongside, government" to mobilise local resources and address public needs (Teasdale et al., 2023). Cooperative movements in Italy, Spain, Portugal and France, philanthropic associations in Germany and Austria, and civic solidarity traditions in Nordic welfare states all contributed to the emergence of organisational logics that predated contemporary social enterprise models (Borzaga et al., 2020). These traditions emphasised collective benefit, community embeddedness, and democratic participation-elements later formalised in the European EMES framework (Defourny & Nyssens, 2010).

1970s–1980s: Practitioner Emergence and Conceptual Foundations - The modern understanding of social entrepreneurship began taking shape in the late 1970s and 1980s through practitioner-led innovations. Bill Drayton's establishment of Ashoka in 1980 marked the first systematic effort to identify, train and support individuals creating social change through entrepreneurial action (Drayton, 2006). This practitioner movement significantly influenced early academic interest, positioning social entrepreneurs as changemakers capable of designing innovative solutions to entrenched social problems.

During the same period, Muhammad Yunus's performed microfinance experiments with the Grameen Bank and started demonstrating how entrepreneurial approaches could address poverty and exclusion at scale. These early initiatives highlighted the potential of entrepreneurial strategies to tackle persistent social challenges where traditional markets and public institutions had proven insufficient.

Together, these practitioner-led innovations laid the groundwork for the subsequent academic conceptualisation and institutional recognition of the field.

1990s: Civic Innovation and Local Catalysis - Throughout the 1990s, emerging scholarship and practice increasingly framed social entrepreneurship as a form of civic innovation. Community actors, grassroots leaders and nonprofit organisations mobilised new resources and structures to catalyse social change, often filling institutional voids created by shifting welfare systems, austerity measures or public-sector limitations (Catford, 1998; Waddock & Post, 1991). Empirical studies highlighted the strong role of local institutional environments and community networks in supporting early social innovation, reinforcing the idea that social entrepreneurship is fundamentally embedded in place-based dynamics (Waddock & Post, 1991).

2000–2004: Earned-Income, Market Logic and Early Critiques - In the early 2000s, the discourse shifted as many scholars and practitioners promoted "earned-income" or "social enterprise" models that emphasised financial sustainability through market-based revenue (Boschee, 2001; Dees, 2001; Simon, 1999). This period saw increasing pressure on nonprofits to adopt entrepreneurial practices. However, critics cautioned that this market orientation risked embedding neoliberal assumptions into social problem-solving, shifting responsibility from institutions to individuals and reframing structural issues as entrepreneurial opportunities (Gupta et al., 2020; Teasdale et al., 2023).

2005–2009: The Heroic Entrepreneur and Academic Mainstreaming - The awarding of the Nobel Peace Prize to Muhammad Yunus and the Grameen Bank in 2006 marked a watershed moment in the evolution of social entrepreneurship, significantly increasing global visibility and scholarly interest in the field (Teasdale et al., 2023; Yunus, 2008). Following this period, academic production surged, particularly within business and management schools, where entrepreneurship theory rooted in opportunity recognition and Schumpeterian innovation became increasingly influential (Gupta et al., 2020; Sassmannshausen & Volkmann, 2016). During these years, a dominant narrative within parts of the literature framed social entrepreneurs as exceptional individuals capable of scaling innovations and transforming systems, often described as "heroic" entrepreneurs (Bornstein, 2004).

At the same time, alternative perspectives gained prominence through European research networks such as EMES and interdisciplinary platforms such as ISIRC. These communities advanced conceptualisations grounded in collective action, social economy traditions and cooperative or participatory governance models, offering a counterbalance to individual-centric North American perspectives (Borzaga et al., 2020; Defourny & Nyssens, 2010; Teasdale et al., 2023). Their work underscored that social enterprise models are deeply shaped by welfare regimes, civic traditions and institutional environments, reinforcing the importance of contextual diversity in understanding the evolution of the field.

2010–2014: Critical Reflexivity and Conceptual Pluralisation - During the early 2010s, scholarship on social entrepreneurship became more critical and theoretically diverse. Researchers highlighted governance tensions, hybrid organising, and the paradoxes associated with simultaneously pursuing social and commercial goals, reflecting an increasing interest in organisational complexity and dual-mission challenges (Gupta et al., 2020). Critical scholars also questioned individualistic and "heroic" narratives, arguing for greater attention to collective action, relational processes and systemic constraints, as well as the broader institutional environments in which social enterprises operate (Gupta et al., 2020; Teasdale et al., 2023). Methodologically, the field matured through bibliometric mapping, comparative analyses and interdisciplinary research, yet significant fragmentation persisted due to competing definitions, diverse theoretical traditions and the coexistence of multiple schools of thought (Sassmannshausen & Volkmann, 2016; Teasdale et al., 2023).

2015–2019: Empirical Expansion and Data-Driven Analysis - During this period, scholars increasingly employed large datasets most notably the Global Entrepreneurship Monitor (GEM) as well as newer data sources such as MOOCs, crowdfunding platforms and large-scale online surveys to explore the prevalence, antecedents and outcomes of social entrepreneurship (Gupta et al., 2020; Sassmannshausen & Volkmann, 2016). Evidence from these studies challenged earlier assumptions that social entrepreneurship emerged exclusively in contexts of state failure or institutional voids. Instead, cross-national analyses demonstrated that higher levels of social entrepreneurial activity were often associated with strong welfare regimes, social trust and institutional support structures (Borzaga et al., 2020; Gupta et al., 2020) suggesting that enabling institutional environments can also stimulate social entrepreneurial activity. Research during this period also expanded into resource mobilisation, networks, financing and organisational hybridity. At the same time, the field intensified efforts to develop more reliable approaches for assessing social value. Despite this growth, scholars consistently observed that consensus on how to measure social impact remained limited, with methodologies varying widely across studies and contexts (Gupta et al., 2020; Sassmannshausen & Volkmann, 2016).

2020s: Consolidation, Pluralisation and Methodological Diversification - Recent studies reveal a broad and increasingly diversified field, characterised by multiple thematic clusters such as social impact measurement, hybrid organising, social innovation, networks and psychological or behavioural dimensions of social entrepreneurship (Gupta et al., 2020; Sassmannshausen & Volkmann, 2016). Bibliometric reviews consistently report exponential growth in publications and greater internationalisation of the field, while also identifying methodological biases most notably an overreliance on English-language, journal-based sources and a relative underrepresentation of books, grey literature and non-Anglophone scholarship (Teasdale et al., 2023). Current debates increasingly focus on contextual variation, the role of leadership, questions of legitimacy, ecosystem-building and the persistent challenge of defining and operationalising social value across diverse institutional environments (Gupta et al., 2020; Teasdale et al., 2023).

1.5.3. Early-stage complexity in social entrepreneurship

The early stage of social enterprise development is widely recognised as the most fragile and least understood phase of the entrepreneurial process. While significant research has examined the scaling and institutionalisation of social enterprises, scholars consistently note that the mechanisms enabling founders to move from an initial idea to a functioning organisation remain underexplored (Gupta et al., 2020; Teasdale et al., 2023). Unlike commercial startups, which often emerge within established market logics and resource structures, social enterprises typically arise in response to unmet community needs, institutional voids or systemic failures. As a result, they enter the entrepreneurial process facing heightened uncertainty, resource scarcity and legitimacy deficits.

Dees (2001) emphasises that social entrepreneurs must "act boldly without being limited by resources currently in hand," capturing one of the core complexities of early-stage development: progress depends not on material assets or formal authority but on the founder's ability to mobilise support through purpose, credibility and relational trust. In the absence of stable revenue models or organisational structures, early-stage social entrepreneurs rely on informal networks, volunteer labour and community relationships, which makes the formation process highly relational and context-dependent (Borzaga et al., 2020). This contrasts with commercial entrepreneurial emergence, where market opportunity, investment readiness and competitive positioning typically shape early decision-making.

Research also highlights that early-stage social entrepreneurship requires constructing new social arrangements rather than operating within pre-existing systems. Alvord, Brown and Letts (2003) demonstrate that many social entrepreneurs must build bridges between actors who have not previously collaborated, negotiate community expectations, and reconfigure institutional norms in order to introduce new solutions. This process of social innovation is iterative and experimental, often involving cycles of adaptation and renegotiation rather than linear venture development. As a result, the early-stage pathway tends to be messy, nonlinear and embedded in complex social dynamics.

Another dimension of early-stage complexity lies in the tension between mission and viability. Founders must simultaneously address an urgent social problem and generate enough organisational capacity to sustain operations. Gupta et al. (2020) argue that this dual focus creates inherent tensions: pressure to innovate coexists with the need to demonstrate credibility to funders, public authorities and beneficiaries. Measuring social value at this stage is particularly challenging, which contributes to legitimacy deficits and affects access to resources. Without a track record, social entrepreneurs must persuade diverse stakeholders to trust an initiative that is not yet fully formed.

These complexities underscore that early-stage social entrepreneurship is fundamentally different from early-stage commercial entrepreneurship. Rather than being driven primarily by opportunity recognition in a market, social ventures emerge through processes of community engagement, institutional negotiation, and problem-oriented innovation. The literature therefore highlights leadership, not resources or market positioning, as a central determinant of early-stage success, as founders must inspire commitment, articulate a compelling vision, and cultivate relationships that enable the venture to take its first steps under conditions of extreme uncertainty.

1.5.4. Localism and contextual diversity

With a significant number of social enterprises being set up because groups of citizens assume responsibilities hitherto ignored or not adequately dealt with by the public bodies in charge" (Borzaga et al., 2020) it is of no surprise that the field continues to be marked by diversity and contextual specificity. The European Commission (2020) stresses that social enterprises are highly rooted in local realities: historical, cultural, and social, which complicates efforts to develop universal theories. This persistent contextual variability is one reason why researchers still struggle to consolidate knowledge on how social enterprises emerge, develop, and succeed, especially in their early stages.

This defining characteristic of social entrepreneurship being its deep embeddedness in local contexts, unlike conventional commercial ventures, makes it a common occasion that they tend to emerge in response to highly specific social, cultural and institutional conditions. As a result, their organisational forms, governance structures, resource strategies and impact pathways vary significantly across regions and communities. This contextual diversity is widely recognised in the literature and represents both a strength and a conceptual challenge for the field (Gupta et al., 2020; Teasdale et al., 2023).

The European Commission's comparative analysis provides one of the clearest illustrations of such diversity. According to its mapping, the origins and development of social enterprises across Europe have been shaped by historically embedded welfare traditions, civic cultures and political economies (Borzaga et al., 2020). In Southern Europe particularly Italy, Spain, France and Portugal, social enterprises evolved from long-standing cooperative and mutual-aid movements. In Germany, Austria and Belgium, they emerged from rich traditions of philanthropic associations and voluntary organisations. In the Nordic welfare states, social enterprises are rooted in traditions of civic solidarity and state–civil society collaboration. In Central and Eastern Europe, by contrast, social enterprise models re-emerged after the transition from socialist regimes, with the field being shaped by donor-driven initiatives, labour-market reforms and targeted public policies. These divergent trajectories illustrate that social enterprises are not uniform organisational entities but expressions of deeply localised traditions of collective action.

The EMES framework (Defourny & Nyssens, 2010) further highlights this contextual variation by conceptualising European social enterprises as hybrid organisations situated between the market, civil society and the state. Their defining dimensions-economic activity, social purpose and participatory governance-manifest differently across welfare regimes and institutional configurations. Borzaga et al. (2020) similarly emphasise that the balance among entrepreneurial activity, social mission and inclusive governance cannot be understood in abstraction but is shaped by national legislation, funding instruments, cultural expectations and community needs.

Localism also shapes how social entrepreneurs identify problems, mobilise support and construct solutions. Alvord, Brown and Letts (2003) show that social innovations often emerge from place-based knowledge, local social networks and lived experiences of exclusion or unmet needs. What counts as a "social problem" and which solutions are considered legitimate vary across contexts, meaning that social enterprises frequently design interventions that are highly tailored to local priorities. This embeddedness enhances relevance and legitimacy but also limits the transferability of models across regions and complicates efforts to develop universal theories of social enterprise.

The literature therefore suggests that contextual diversity is not an incidental feature of social entrepreneurship but a structural one. Social enterprises often emerge where institutional gaps, welfare limitations or cultural frameworks create spaces for alternative forms of value creation. Their success depends not only on organisational design but also on alignment with local expectations, trust networks, policy environments and socioeconomic conditions. As a result, comparisons across social enterprises must account for contextual differences rather than assuming the existence of a single, standardised model.

This emphasis on localism has direct implications for leadership. Because early-stage social entrepreneurs cannot rely on formal authority or established market demand, their capacity to mobilise support depends heavily on how well they understand and navigate the social, cultural and institutional dynamics of their specific context. Leadership in social entrepreneurship is therefore inherently adaptive and relational, shaped by the unique characteristics of the communities within which social enterprises operate.

The strong embeddedness of social enterprises in their local contexts also complicates efforts to generalise findings or derive universal principles from the literature. Because organisational models, governance forms and resource strategies depend heavily on place-specific conditions, comparative studies often struggle to identify common patterns that apply across settings (Gupta et al., 2020; Teasdale et al., 2023). This contextual variation makes it difficult to propose a “one-size-fits-all” model of social entrepreneurship or to draw definitive conclusions about which leadership practices are most effective. As a result, leadership in social entrepreneurship remains comparatively underexplored: while the broader leadership literature offers extensive theoretical frameworks, these models cannot be automatically transferred to social enterprises without considering their unique mission-driven and context-dependent nature. This gap further reinforces the need to investigate how leadership actually operates within the early stages of social entrepreneurship, particularly across diverse European environments.

1.6. The Evolution of Leadership Theory and Its Relevance for Social Entrepreneurship

1.6.1. Historical development of Leadership research

Leadership research has evolved substantially over the past century, progressing through several distinct phases that reflect broader societal and organisational understandings of authority, influence and human motivation. The following overview, drawing on Northouse (2019), outlines the historical development of leadership theory.

Early 1900s: Leadership as Control and Domination - Early definitions in leadership emphasised authority, power centralisation, and top-down control. Leadership was often equated with “the ability to impress the will of the leader on those led and induce obedience, respect, loyalty, and cooperation” (Moore, 1927). This reflects a mechanistic, command-and-control worldview incompatible with later participatory or mission-driven forms of leadership.

1930s: Trait-Based Understandings - The focus shifted to identifying the inherent personality traits that distinguish leaders. Leadership began to be conceptualised as influence rather than domination, with scholars recognising that leaders both shape and are shaped by group dynamics (Northouse, 2019).

1940s: Behavioural Perspectives and Group Processes - Leadership research moved toward observable behaviours, particularly how individuals direct group activity. Scholars distinguished between leadership through persuasion and leadership through coercion (Copeland, 1942). This period laid groundwork for understanding leadership as a dynamic and relational process.

1950s: Leadership as Relationship and Effectiveness - Three dominant themes emerged: leadership as group behaviour; leadership as the development of shared goals; and leadership as a mechanism influencing group effectiveness. Researchers increasingly viewed leadership as a social interaction rather than merely a set of traits (Northouse, 2019).

1960s: Leadership Toward Shared Goals - Consensus formed around leadership as behaviour that influences individuals toward shared objectives. Leadership was defined explicitly as influence aligned around collective purpose (Seeman, 1960), a precursor to transformational approaches.

1970s: Organisational Behaviour and Burns' Transformational Paradigm - The 1970s marked a major shift. Leadership began to be understood as a reciprocal process involving motives, values, and collective goal-setting (Burns, 1978). Burns' conceptualisation established the foundation for transformational leadership emphasising mutual elevation of leader and follower toward higher moral purpose. In detail he argued that "Leadership is the reciprocal process of mobilizing by persons with certain motives and values, various economic, political, and other resources, in a context of competition and conflict, in order to realize goals independently or mutually held by both leaders and followers".

1980s: Expansion and Fragmentation - Traits, Excellence, and Transformation - The 1980s saw an explosion of leadership theories. Influence became the dominant construct, while scholars refined distinctions between management and leadership. Trait theories briefly resurged alongside excellence-based leadership models. Crucially, transformational leadership gained traction, defined as leadership that raises motivation and morality among both leaders and followers (Northouse, 2019). In detail, Burns (1978) argued that leadership occurs "when one or more persons engage with others in such a way that leaders and followers raise one another to higher levels of motivation and morality".

1990s–21st Century: Contemporary Relational Approaches - The field diversified into several influential models including authentic, spiritual, servant, adaptive, followership and discursive-based leadership (Northouse, 2019). Each emphasises relational processes, values, ethical conduct, or collective problem-solving. Leadership increasingly came to be seen as socially constructed and dependent on context. Most importantly a common consensus is reached between scholars, that leadership is complex to define as a concept, and thus it continues to have different meaning for different people and contexts.

As seen above, in contemporary leadership scholarship, several influential approaches coexist, including transformational leadership which rose to prominence in the 1980s, and later models such as authentic, servant, adaptive, followership and discursive leadership (Northouse, 2019). Together, these perspectives reflect a broader shift from earlier hierarchical and trait-based theories toward relational, values-driven and process-oriented understandings of leadership.

This thesis adopts Northouse's (2019) conceptualisation of leadership as a process whereby an individual influences a group of individuals to achieve a common goal. Framing leadership as a process is particularly relevant for social entrepreneurship because it emphasises behaviours, relationships, and influence dynamics rather than fixed personal characteristics. A trait-based approach, in contrast, would restrict leadership to individuals with innate qualities, whereas social entrepreneurship literature, especially in the context of Ashoka's "everyone a changemaker" paradigm (Drayton, 2006), emphasises that leadership can emerge from diverse backgrounds and does not depend on formal authority or pre-existing status.

1.6.2. Overview of Major Leadership Models and Their Relevance to Social Entrepreneurship

Social enterprises, particularly in their early stages, operate under conditions that differ fundamentally from those assumed in much of the mainstream leadership literature. They often emerge informally, lack hierarchical structures, rely on relational trust rather than formal authority, and must actively construct legitimacy among stakeholders without the supporting mechanisms available to commercial ventures. These contextual characteristics make it problematic to directly transfer leadership models developed for traditional business organisations into the social enterprise setting. Instead, leadership theories must be examined critically and selectively, with attention to their underlying assumptions about authority, motivation, organisational structure and resource availability. This contextual sensitivity is especially important when analysing leadership in social entrepreneurship, where influence is frequently exercised without formal power and collective commitment must be mobilised around a mission that is still taking shape.

Given the variety of leadership theories developed over the past decades, an initial screening of leadership approaches was conducted based on their relevance to early-stage social entrepreneurship. Drawing on Northouse's (2019) classification of contemporary leadership theories, a range of models including transactional, servant, authentic, adaptive, distributed, spiritual, followership and discursive leadership, were reviewed at a conceptual level. However, not all of these approaches offer explanatory value for contexts characterised by resource scarcity, lack of formal authority, emergent organisational structures and strong mission orientation. Based on their relevance to mobilisation, legitimacy-building, innovation and collective purpose, a subset of leadership models was selected for closer examination in this chapter.

The models selected for analysis include transactional, servant, authentic, adaptive, distributed and transformational leadership. These approaches are examined briefly in the following section to assess their compatibility with the specific conditions of early-stage social entrepreneurship. The detailed conceptualisation of transformational and visionary leadership that underpins the analytical framework of this thesis is developed in the subsequent chapter.

Transactional Leadership
Transactional leadership is grounded in exchange relationships between leaders and followers, where compliance is achieved through contingent rewards, performance monitoring and corrective actions (Bass, 1985; Northouse, 2019). This approach assumes the presence of formal authority, clearly defined roles, and tangible incentives that can be exchanged for performance. While transactional leadership may be effective in stable and established organisational environments, its relevance to early-stage social entrepreneurship is limited. Social entrepreneurs typically lack the material resources, hierarchical structures and contractual mechanisms required to sustain transactional exchanges. As a result, leadership based on reward–punishment dynamics offers little explanatory value for understanding how founders mobilise commitment and action in contexts characterised by informality and resource scarcity. Transactional leadership is therefore included primarily as a baseline contrast to more relational and motivational leadership approaches.

Servant Leadership
Servant leadership places emphasis on ethical conduct, empathy and the prioritisation of followers' needs, positioning the leader primarily as a servant to others (Greenleaf, 1977; Northouse, 2019). This model resonates strongly with the value-driven orientation of social entrepreneurship and has been associated with positive social outcomes in mission-oriented organisations. Empirical evidence suggests that servant leadership is positively related to social performance and leader satisfaction in social enterprises (Jeong, 2024). However, servant leadership places less emphasis on vision articulation, innovation and system-level change. While it contributes to ethical grounding and relational trust, it does not sufficiently explain how social entrepreneurs initiate ventures, mobilise diverse stakeholders or challenge existing structures during the startup phase. As such, servant leadership offers partial insight into social enterprise leadership but does not fully capture its transformative dynamics.

Authentic Leadership
Authentic leadership focuses on self-awareness, transparency, internalised moral values and consistency between leaders' actions and beliefs (Avolio & Gardner, 2005; Northouse, 2019). In the context of social entrepreneurship, authenticity plays an important role in legitimacy-building, particularly when founders seek to attract support without formal authority or institutional backing. Authentic leadership helps explain why followers trust and engage with leaders based on perceived integrity and value alignment. However, the model primarily addresses the moral and personal dimensions of leadership rather than the processes through which collective action is mobilised. As a result, authentic leadership alone does not adequately explain how social entrepreneurs translate personal conviction into coordinated action or guide others toward a shared future-oriented mission.

Adaptive Leadership
Adaptive leadership conceptualises leadership as the ability to mobilise people to confront complex, uncertain and evolving challenges (Heifetz et al., 2009; Northouse, 2019). This approach aligns well with the volatile environments in which social enterprises operate, particularly during early stages characterised by experimentation, learning and ambiguity.

Adaptive leadership highlights problem-solving, flexibility and collective learning, which are essential in navigating resource constraints and institutional uncertainty. However, adaptive leadership places comparatively less emphasis on vision articulation and inspirational motivation. While it explains how organisations respond to challenges, it offers limited insight into how social entrepreneurs generate belief in a mission that has not yet materialised or inspire others to commit to long-term social change.

Distributed Leadership

Distributed leadership emphasises shared influence, collective decision-making and leadership as an emergent property of group interaction rather than as a function of a single individual (Gronn, 2002; Northouse, 2019). This perspective aligns with democratic governance principles and cooperative traditions commonly associated with social enterprises, particularly in European contexts. However, distributed leadership presupposes the existence of an established organisation, a functioning collective and relatively stable roles. In the early stages of social entrepreneurship, leadership is typically concentrated in a founder who must first mobilise people, resources and legitimacy before leadership can be shared. Consequently, distributed leadership becomes more relevant at later stages of organisational development and offers limited explanatory power for understanding how social enterprises are initially formed.

Transformational Leadership

Transformational leadership emerged prominently in leadership scholarship through the work of Burns (1978) and was later developed by Bass (1985), who conceptualised leadership as a process that transforms both leaders and followers by elevating motivation, values and collective purpose. Unlike transactional leadership, which is based on exchanges and compliance, transformational leadership emphasises vision articulation, inspirational motivation, moral influence and the development of followers (Northouse, 2019). At its core, transformational leadership seeks to mobilise individuals to transcend self-interest in pursuit of a shared mission, particularly in contexts characterised by uncertainty and change. Prior research suggests that this leadership approach is especially relevant in mission-driven and resource-constrained settings, where formal authority and material incentives are limited and influence must be exercised through meaning, trust and inspiration (Alvord H. et al., 2003; Carlson, 2022).

Positioning Transformational Leadership

The comparative analysis above indicates that while several leadership models illuminate important dimensions of social entrepreneurship — including ethics, trust, adaptability and participation — none independently capture the full set of mechanisms required for early-stage venture formation. Transformational leadership encompasses vision articulation, motivational mobilisation, moral orientation and follower development within an integrated framework. Empirical research further suggests that transformational leadership demonstrates consistent positive associations with both social and economic performance outcomes in social enterprises (Jeong, 2024). For these reasons, transformational leadership is adopted as the primary analytical lens for examining how social entrepreneurs initiate ventures, mobilise stakeholders and generate social wealth. The following chapter develops the conceptual framework based on this perspective.

1.6.3. Leadership as a core element (to break through the barriers and succeed)

Synthesising insights from the social entrepreneurship literature, early-stage social enterprise formation appears to depend on a set of leadership needs that differ from those assumed in traditional organisational contexts. These leadership needs derive directly from the structural and contextual conditions within which social enterprises operate. They serve as analytical criteria for evaluating leadership model suitability, and do not restate the defining characteristics of social entrepreneurship. Rather, they represent leadership capabilities required to respond effectively to those characteristics. In other words, they translate the structural and contextual conditions identified in the social entrepreneurship literature into leadership-relevant requirements.

As a result, we derive considering the Literature review that a starting social enterprise contextualizes within:

Primacy of social mission over profit

Resource scarcity

Absence of formal authority

Reliance on relational trust

Local embeddedness

Hybrid and informal organisational forms

High uncertainty

Collective action

As a response, leadership, which is the crucial element that binds the conditions for the enterprising genesis, traces back to these in the sense that:

Table 1: Leadership mechanisms to break through startup barriers

MOBILISATION WITHOUT FORMAL AUTHORITY through vision and moral credibility	**Addresses:** • Absence of formal authority at startup • Hybrid, informal organisational forms • Collective action rather than individual control **Logic:** When no hierarchy, contracts or incentives exist, leadership must mobilise people through influence, vision and credibility, not command.
TRUST AND LEGITIMACY building, grounded in ethical conduct and relational engagement	**Addresses:** • Reliance on relational trust and legitimacy • Local embeddedness and contextual diversity • Emergence under resource scarcity

	Logic: In local, mission-driven contexts, legitimacy is not granted institutionally but it is earned relationally, especially when resources are scarce and uncertainty is high.
COLLECTIVE COMMITMENT sustained through inspirational purpose rather than incentives	**Addresses:** • Primacy of social mission over profit • Resource scarcity • Collective action **Logic:** When financial incentives are weak or absent, commitment must be sustained by shared meaning and moral purpose, not transactional rewards.
INNOVATION AND LEARNING supported by intellectual stimulation and experimentation	**Addresses:** • High uncertainty and experimentation • Emergence under resource scarcity • Hybrid and evolving organisational forms **Logic:** Early-stage social enterprises do not execute stable business models but learn their way forward through iteration, adaptation and social experimentation.
CAPABILITY DEVELOPMENT enabled by individualised consideration and mentorship	**Addresses:** • Collective action • Informal organisational structures • Long-term social value creation **Logic:** Because social enterprises depend on people rather than systems, leadership must develop others' capacities, not merely coordinate tasks.

As a result a direct comparison of the Leadership models compatibility is founded following the aforementioned criteria.

Table 2: Leadership models fit

Leadership approach	**Mobilisation without authority**	**Trust & legitimacy**	**Collective commitment**	**Innovation & learning**	**Capability development**
Transactional	**Low** (incentive-based)	**Low** (formal compliance)	**Low** (extrinsic)	**Low** (rule-bound)	**Low** (task-focused)
Servant	**Medium** (moral example)	**High** (ethical care)	**Medium** (service-oriented)	**Low** (stability-focused)	**Medium** (supportive)

Leadership approach	**Mobilisation without authority**	**Trust & legitimacy**	**Collective commitment**	**Innovation & learning**	**Capability development**
Authentic	**Medium** (self-consistency)	**High** (value transparency)	**Low–Medium** (personal identification)	**Low** (reflection-oriented)	**Low** (limited coaching focus)
Adaptive	**Medium** (problem framing)	**Medium** (situational legitimacy)	**Low** (challenge-driven)	**High** (experimentation)	**Medium** (learning-oriented)
Distributed	**Low (startup)** (requires structure)	**Medium** (shared responsibility)	**Medium** (collective ownership)	**Medium** (peer learning)	**Medium** (role diffusion)
Transformational	**High** (vision-driven)	**High** (moral credibility)	**High** (purpose-based)	**High** (intellectual stimulation)	**High** (individualised development)

The comparison highlights that while several leadership approaches address specific aspects relevant to early-stage social entrepreneurship, none integrate all five leadership needs simultaneously. Transactional leadership performs poorly across dimensions due to its reliance on formal authority and incentives. Servant and authentic leadership contribute strongly to ethical grounding and legitimacy but provide limited insight into mobilisation and innovation. Adaptive leadership supports learning under uncertainty but lacks a strong motivational and visionary component. Distributed leadership aligns with participatory ideals but presupposes organisational maturity. Transformational leadership, by contrast, demonstrates the highest degree of alignment with the five leadership needs identified in this study, integrating vision articulation, moral credibility, motivational influence, innovation and follower development within a single framework. Accordingly, transformational leadership is adopted as the primary analytical lens for examining how social entrepreneurs initiate ventures, mobilise stakeholders and create social wealth. The following chapter develops the conceptual framework based on this perspective.

1.7.Social wealth

In this dissertation, social wealth is approached as a multidimensional outcome of social entrepreneurship that extends beyond economic indicators to encompass social value creation, community empowerment and long-term societal wellbeing. While social wealth is widely recognised in both academic and policy discourse as a core objective of social entrepreneurship, the concept is often treated in broad or implicit terms. To address this limitation, the present study adopts a focused interpretation of social wealth that allows for clearer analytical grounding and empirical exploration.

More specifically, this research concentrates on education as a central manifestation of social wealth. Education is understood here not as formal schooling systems, but as the training initiatives, learning opportunities and capacity-building activities that social enterprises develop within their communities. These initiatives enable individuals to acquire skills, expand their capabilities and overcome social, economic or structural barriers. In this sense, education is conceptualised as a process of community empowerment through which social enterprises strengthen people's capacity to participate in society, access opportunities, solve problems and improve their quality of life.

This interpretation aligns closely with European policy perspectives on social entrepreneurship. The European Commission recognises social enterprises as strategic actors in addressing major societal challenges and contributing to sustainable and inclusive development across generations (Borzaga et al., 2020). Drawing on European Commission reports, Fernández-Guadaño and Díez (2023) emphasise that social entrepreneurship is recognised as a strategic factor for sustainable growth and positive social impact, offering concrete and innovative solutions to key societal challenges in Europe. Within this European policy context, education-oriented initiatives provide a concrete mechanism through which social enterprises translate mission-driven activity into measurable forms of community-level social wealth.

1.7.1. Social Wealth: Explanation and Contextualisation

Despite the central role attributed to social value creation in social entrepreneurship, the literature consistently highlights that social wealth is more often assumed than empirically demonstrated Teasdale et al. (2023), reflecting persistent challenges in conceptual clarity, operationalisation and measurement. Similarly, Rawhouser et al. (2019) and Saebi et al. (2018) note that although social impact is widely invoked in the field, there remains limited consensus regarding how it should be defined, measured or compared across contexts. This conceptual ambiguity makes it necessary to clarify what is meant by social wealth within the scope of this study.

Social entrepreneurship is broadly understood as an approach oriented toward generating social value rather than maximising private profit (Dees, 2001; Roger L. & Osberg, 2007). Within Europe, social enterprises are frequently conceptualised as hybrid organisations that combine entrepreneurial activity with explicit social missions and participatory governance structures (Defourny & Nyssens, 2010). The European Commission's mapping of social enterprises further emphasises that these organisations are embedded within local welfare systems and operate under legal and institutional arrangements designed to protect mission integrity (Borzaga et al., 2020). In this context, mechanisms such as non-profit distribution constraints and asset locks help safeguard the public benefit orientation of social enterprises by limiting the extraction of private gains and preserving collective value over time (Borzaga et al., 2020).

However, while institutional safeguards help protect social purpose, they do not in themselves explain how social wealth is generated in practice, particularly during early-stage development. Social wealth creation is often rooted in relational processes, learning dynamics and sustained community engagement rather than in formal governance arrangements alone. Education-focused initiatives such as training programmes, upskilling and reskilling activities, and community-based learning spaces, represent one of the most tangible pathways through which social enterprises contribute to societal wellbeing.

To operationalise social wealth more concretely, this study adopts a capital-based perspective. Human capital refers to the accumulation of knowledge, skills and competencies that enhance individuals' capabilities and life opportunities (Becker, 1975). Contemporary social entrepreneurship research highlights that education- and training-oriented initiatives frequently strengthen employability, self-efficacy and long-term empowerment among participants, particularly within marginalised communities (Borzaga et al., 2020; Rawhouser et al., 2019). In this sense, social enterprises contribute to human capital formation through structured and informal learning opportunities.

Social capital encompasses networks, trust relationships and norms of reciprocity that facilitate cooperation and collective action (Coleman, 1988; Putnam et al., 1993). Given the strong local embeddedness of social enterprises (Borzaga et al., 2020; Teasdale et al., 2023), participatory training initiatives and collaborative learning environments often reinforce relational bonds and civic engagement. Through these processes, social enterprises strengthen the social infrastructure necessary for sustained collective problem-solving.

Intellectual capital refers to the knowledge assets, innovation capacity and collective learning embedded within organisations and communities (Edvinsson & Malone, 1977; Nahapiet & Ghoshal, 1998). Social enterprises frequently engage in experimentation and adaptive innovation in response to complex social challenges (Gupta et al., 2020). By developing new service models, pedagogical approaches or community-based solutions, they contribute to the creation and diffusion of locally embedded knowledge. In this way, intellectual capital becomes a further manifestation of social wealth.

These three forms of capital are mutually reinforcing. Educational initiatives that enhance individual competencies (human capital) often strengthen networks and trust (social capital), which in turn facilitate knowledge exchange and innovation (intellectual capital). Social wealth can therefore be conceptualised as the cumulative enhancement of these interconnected capital forms within communities.

Crucially, the generation of such capital is not automatic. Particularly in early-stage social enterprises characterised by limited resources, absence of formal authority and high uncertainty, the development of human, social and intellectual capital depends on leadership practices. The ability to mobilise participants around learning opportunities, build legitimacy for emerging initiatives and foster experimentation is shaped by how founders articulate vision, embody credibility and support capability development. Social wealth, especially when expressed through education, training and empowerment thus emerges through leadership-enabled processes rather than institutional design alone. This reinforces the relevance of examining how transformational and visionary leadership contribute to the conditions under which social wealth can be created and sustained.

2. Chapter 2 - Conceptual framework

2.1. Purpose of the Conceptual Framework

The purpose of this conceptual framework is to deepen in and set the base for how leadership operates as a catalyst in the formation stage of social enterprises and the creation of social wealth. Within this chapter, the insights from the literature review are synthesized into an analytical framework lens to guide the qualitative research and the empirical investigation. It helps to go beyond just a theoretical analysis and dive into grounded results and contextualization, particularly about the early-stage social entrepreneurship.

In that sense, the framework is designed to explain how founders initiate social enterprises "from zero" and reveal the pathway through which leadership practices contribute to the creation od social wealth, with particular emphasis on education, training and community capability-building.

2.2. Leadership as an Emergent, Influence-Based Process

This thesis adopts a process-oriented view of leadership, drawing on Northouse's (2019) definition of it as a process whereby an individual influences a group of individuals to achieve a common goal. This fits well with social entrepreneurship where founders are usually operating without formal authority, organisational hierarchies or stable resources.

Despite this study not relying on a traditional trait-based perspective, it acknowledges still that some leadership competencies, for example resilience, opportunity recognition and relational influence, can support a successful leadership enactment in various entrepreneurial contexts. However, these are not treated as fixed personal characteristics and thus the analytical focus remains on observable leadership behaviours, relational interactions and value-driven practices.

Leadership can also be understood as either assigned or emergent. Assigned leadership is linked to formal positions or titles, whereas emergent leadership arises when individuals gain influence through their actions and the support of others (Northouse, 2019). Due to the fact that social entrepreneurship at its beginning lacks formal roles, established structures or institutional legitimacy, this thesis focuses primarily on emergent leadership.

2.3. Focus on Transformational Leadership

Transformational leadership constitutes the backbone of this thesis because it provides a close alignment with the realities of early-stage social entrepreneurship. Being one of the approaches that has been majorly studied, transformational leadership emphasizes motivation beyond self-interest, value-driven action, and the development of followers toward collective goals (Avolio & Gardner, 2005; Bass, 1985).

Within the social entrepreneurship context, transformational leadership provides a comprehensive and robust explanation of how founders inspire commitment in the absence of material incentives, foster trust without formal authority, and sustain engagement around a mission that has yet to demonstrate tangible outcomes. Transformational leadership does not rely on exchange-based mechanisms, but instead operates through influence, vision and moral credibility-elements that are essential when the results are still uncertain and the social enterprises in initial-formation stage.

As a result of the literature review, this thesis aligns with and adopts the transformational leadership four-component (4I) model comprising idealised influence, inspirational motivation, intellectual stimulation and individualised consideration (Avolio & Gardner, 2005; Bass, 1985; Northouse, 2019). The four dimensions allow to build towards the operationalization of leadership and for analysing how it enables social enterprise formation and social value creation.

2.4. Transformational Leadership Dimensions in Early-Stage Social Entrepreneurship

Idealized Influence.

This factor is used to describe leaders who act as strong role models for followers; followers identify with these leaders and want to emulate them. Leaders of this kind usually have very high standards of moral and ethical conduct and can be counted on to do the right thing. They are deeply respected by followers, who usually place a great deal of trust in them. They provide followers with a vision and a sense of mission. (Northouse, 2019)

Inspirational Motivation

This factor is used to describe leaders who communicate high expectations to followers, inspiring them through motivation to become committed to and a part of the shared vision in the organization. What it means in practice, is that leaders use symbols and emotional appeals to focus group members’ efforts to achieve more than they would in their own self-interest. Team spirit is enhanced by this type of leadership. (Northouse, 2019)

Intellectual Stimulation

This factors concerns leadership that stimulates followers to be creative and innovative and to challenge their own beliefs and values as well as those of the leader and the organization. This type of leadership supports followers as they try new approaches and develop innovative ways of dealing with organizational issues. It encourages followers to think things out on their own and engage in careful problem solving. (Northouse, 2019)

Individualised Consideration

This factor is characteristic of leaders who provide a supportive climate in which they carefully listen to the needs of followers. They act as coaches and advisers while assisting followers to become fully actualized. These leaders may use delegation to help followers grow through personal challenges. (Northouse, 2019)

2.5. Leadership Mechanisms Enabling Social Enterprise Formation

When considered as a continuum, the 4I constitute an operational reality that enable the formation of the early-stage social entrepreneurship through interrelated mechanisms. These mechanisms listed below, as derived from the critical literature analysis, highly contribute to the transformation of ideas into actual social enterprises.

- Mobilisation without formal authority;
- Trust and legitimacy-building;
- Collective commitment;
- Innovation and learning;
- Capability development.

2.6. Visionary Leadership as the Central Driver

Transformational leadership comprises several dimensions, and within these inspirational motivation and idealized influence are ones that are particularly identified in early stage social entrepreneurship. These two are a fundamental expression of the visionary component of transformational leadership and enable the founders to give meaning to their actions and to articulate the desired future results. In that way, despite the future state being uncertain and the current lack of resources characterizing the initial phase, it acts as a direct source of motivation, and meaning is created. This expression of the visionary aspect of leadership allows social entrepreneurs to align personal skills, community needs, and collective aspirations around a coherent mission. Also, to translate abstract social problems into initiatives, such as education or training programmes, that participants can engage with and support. It is in this sense that visionary leadership does not constitute a different model for this thesis bit a core and integrated dimension critical for succeeding when starting from zero.

2.7. From Leadership to Social Wealth Creation

Social wealth is mentioned and approached in this thesis, focusing in one of its dimensions referring to the enhancement of collective capabilities within communities, which is generated through education, training, and empowerment initiatives. Thus, rather than treating it as an abstract outcome, it is instead seen as tangible processes that enhance people's and communities' capacity to act and participate in the resolution of societal problems. And transformational leadership, with its visionary element, is exactly what allows the founders of social initiatives and enterprises to support their communities and establish emerging organisations to cover the identified needs.

- Mobilisation without formal authority: gather individuals around a shared mission despite the lack of resources.
- Trust and legitimacy-building: establish credibility within local contexts, making educational initiatives socially accepted and supported.
- Collective commitment: sustain engagement in learning processes even in the absence of strong financial incentives.
- Intellectual stimulation and innovation: encourage experimentation and adaptive learning, enabling training programmes to evolve in response to community needs.
- Individualised consideration: foster mentorship and capability development among participants.

With the above processes stemming from leadership and characterizing SE operation, social wealth is flourishing in many aspects as a result.

Human capital is altered, reflecting the developing skills, competencies, employability, self-efficacy and empowerment among participants. Education and training initiatives enhance individuals' capacity to access labour markets, engage in civic life, and improve their socio-economic position.

Social capital is strengthened by the creation of networks of trust, collaboration between individuals and the community in general, and collective engagement. The participants engage in shared learning environments, ties between members deepen, community closeness increases, and cooperation is fortified.

Intellectual capital is also affected, since within the fostered learning environments that are created by the SEs, new approaches, methodologies, and models are generated to help approach and resolve social needs.

All these forms of capital interact, reinforcing one another, contributing to longer-term community resilience and sustained social impact. In this sense, despite leadership not producing direct social wealth, it rather acts as a catalyst that enables social enterprises to form, stabilise, and implement educational and capability-building initiatives through which social wealth is progressively created and embedded within local contexts to solve persistent challenging social problems.

2.8. Conceptual Model

The figure below presents the conceptual model that is the core of the thesis and will drive the research. It lists the contextual realities that aspiring to startup SEs face as well as the early-stage targeted constraints, then shows the Response mechanism that is mobilized in order to pursue the vision, and finally generate social wealth.

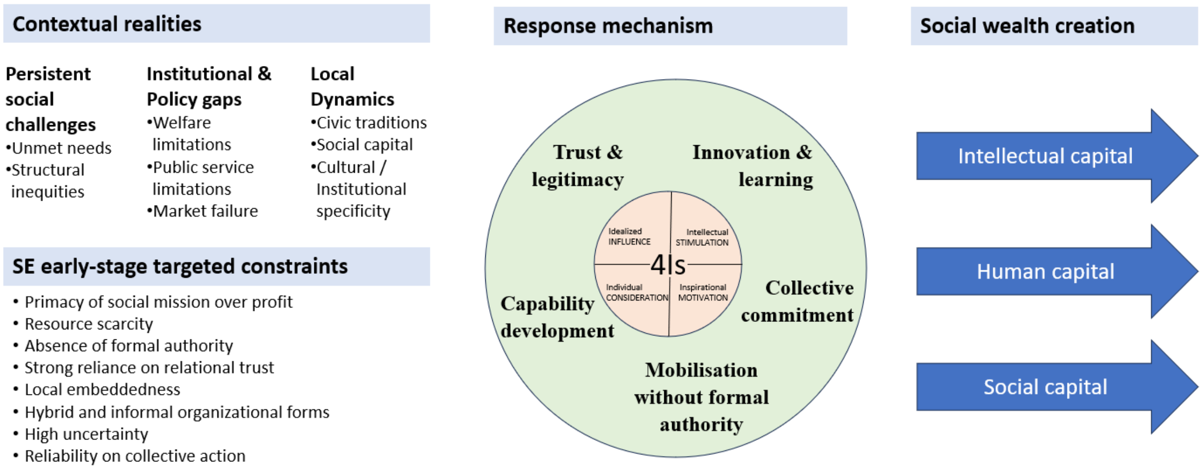

Figure 1: Conceptual model

3. Chapter 3 – Research Methodology

3.1. Research Design

This study aims to deepen into transformational leadership in social enterprises, to explore how it is enacted in practice in the early-stage development. It seeks to perceive how founders under conditions characterised by resource scarcity, absence of formal authority, relational trust dependence, and high uncertainty mobilise people and resources in their context, manage to build legitimacy and trust, and generate social wealth. All these can be traced back into specific behaviours that act as enabling elements and appear in the early stages, linked to transformatonal leadership.

It is obvious that such a research needs grounded responses and depth, because a quantitative analysis could not reveal such dynamic and intricate mechanisms. For that reason and to capture the complexity of the founders' experiences a qualitative analysis was selected to explore the experiences, behaviours and meanings and not just touch the surface with simple statistic analysis. More specific, semi-structured interviews were selected as the most appropriate tool to collect the data, because the participants could easier tell their stories retrospectively, it ensured that the same subjects were discussed across all interviews and allowing comparative analysis and still left some flexibility in the responses.

3.2. Research Strategy

The research, used as a tool semi-structured interviews, in order to gain depth in the responses since the interaction between researcher-respondent allows building better trust, founders are more motivated to join the initiative if they believe that their story will be appreciated, and more in-depth data are generated (eg complex behaviours of building legitimacy, or fighting uncertainty).

The above data were crucial to analyse the conceptual framework compared to real contexts and is something that secondary data (reports, websites, annual documents) could not have provided.

As for the selection of the semi-structured format of the interviews, the main reason was to allow flexibility and adaptation of the responses to the various contexts (the sample of the respondent leaders is diverse and their SEs operate in different ways). Moreover it allowed respondents to be able to focus on what they considered more important in each chapter of the interview.

As a strategic step, the interview guide was created (the open questions categorized in chapters) and it was shared to the participants prior to the interviews. The questions were divided into 4 chapters (seen in Appendix) covering::

1. Contextual realities (macro-level conditions)

2. Early-stage organisational constraints
3. Leadership behaviours and mechanisms (aligned with the 4Is and their contextual expressions)
4. Social wealth outcomes, particularly education, training and capability-building initiatives

During the interviews, every participant was asked to provide their experiences and openly share their journey, also in case the SE was already well established, to think back in the starting phase retrospectively, and the guide was followed in order. When there was a possibility to deepen in some responses, the participants were allowed to expand freely, and this helped to observe how each of them focused more deeply on sharing the experience on different aspects.

3.3. Theoretical Positioning

When concerning leadership in the context of social enterprises, the literature review has revealed that it rather not be considered as a fixed trait that can objectively be measured, but as highly dependent on the context and also the relationships, the trust, the perceptions, peoples' experiences etc. Every founder feels and expresses leadership differently in response to specific social challenges, and thus their behaviors significantly differ depending on each context, the founders themselves, the organization format and the constrains. For example, it is not the same motivating volunteers in a resource-poor social enterprise than employees in a corporation. Thus, a purely objective measurement would struggle to capture operationalization elements (as seen in the conceptual framework) concerning mainly but not limited to legitimacy, trust-building, vision and meaning in action, motivations, social mission. This sets the interpretivist paradigm as the appropriate approach to the research.

Positivism would fail to objectively measure leadership because in this study, lived experiences are central, the meaning if leadership to each founder is subjective and more importantly leadership is socially enacted. So numbers alone could not explain, for example, how founders navigated uncertainty or how legitimacy emerged, and it would have been insufficient.

Continuing, when concerning the questions of the interviews, the theoretical framework was heavily considered in order to generate the categories and the sub questions, in a way that the interviews would be characterized by an explorative nature and not just occur to prove the framework. The participants responses were expected to reinforce or even extend the theory, thus freedom of expansion in the responses, a friendly climate, and deepening in the participants interests were always implemented.

The above positioning allowed for a detailed alignment of the research with the theoretical framework in order to pursue successfully responding to the research questions.

3.4.Data Collection

Regarding the practicalities of the interviews, online meetings and phone calls were selected as the most appropriate in order to fit the busy schedules of the founders, but also to resolve the geographical issues (dispersed participants from around Greece and Portugal). The platform used was Google Meet for the online interviews and WatsApp for the phone calls and the languages used Greek and Portuguese. The time of the interviews varied between 40minutes to 1hour and a half, and before every interview verbal permission was obtained for the audio recording of the session. During the interview notes were taken for later verification of the transcripts and all the interviews followed the same questions flow navigating within the 4 sections (total of 12 questions) as seen in Appendix A.

SECTION A – Context & Startup

SECTION B – Leadership & Mobilisation

SECTION C – Commitment & Sustainability

SECTION D – Social Wealth

The recordings were later transcribed using AI-assisted transcription and manually verified, translated to English, and condensed for presentation purposes in order to avoid unnecessary extension in the responses and to clear them non-substantive conversation elements. Then all of the condensed responses (as seen in Appendix B) were checked closely for accuracy and to guarantee representativeness of the conversations. The participant names were omitted and only the organization names remained as the identification point.

During the collection, the main difficulty concerned the availability of the founders to meet and find an available time. Moreover, there was a difficulty in engaging more founders from other organisations due to the lack of time (many of them were working on their social enterprise initiative as a side activity from their main occupation).

Finally, in the interviews that participants were asked to retrospectively respond to the questions, the interview encouraged reflection on the constrains, the leadership decisions and the development of the organisations in the early stages.

3.5.Sampling Strategy

Due to the nature of the Research Questions and to successfully implement the research framework, a purposive sampling was selected as the appropriate method to generate meaningful data. The main goal of the sampling strategy was to engage participants that would deepen in their experiences and respond with quality and detail especially about their experiences in the early stages, their decisive role as leaders and with a strong reflective capacity. And this profile, better fitted direct founders of such organisations with strong social mission (social enterprises) and not ordinary staff/volunteers.

The interviews pursued rich reflection, quality and detailed narratives and was operationalized in Greece and Portugal. The two countries were selected due to being both in South Europe and covering the two edges (east and west) while at the same time sharing similar institutional conditions, constraints, gaps and contexts for social entrepreneurship.

Considering the practical concerns mentioned (difficulty to identify founders of early start-up social enterprises, lack of time from the side of founders to participate in the interviews) the sample was kept relatively small, but still in line with the theoretical positioning of this qualitative research and supporting the requirements for richer, deeper and more reflective data relevant to the research questions.

The sample consisted of 6 founders of social enterprises, 3 from Greece and 3 from Portugal.

3.6. Data Analysis

The data analysis was conducted following a framework-guided thematic analysis with deductive thematic logic and openness to contextual variation. The interviews findings were carefully organized into an existing structure that was informed (a priori) by the transformational leadership dimensions/categories as defined in the theoretical part of the thesis. This allowed to closely monitor these results in alignment with the theoretical framework and explore in practise the mechanisms that were hinted, following a deductive thematic logic. Despite this pre-defined categorization for the analysis, openness to contextual variation was maintained in order to allow (if any) emergent thematics or focuses for the transformational leadership application in practice.

After the interviews were implemented and the data collected, all the data was read carefully several times and the transcripts revised for clarity and representation. Thanks to the sample being kept meaningfully small, the responses were cross-compared in order to reveal recurring ideas, similarities, repeated concerns and variations between the respondents. Moreover, reviewing the interviews several times allowed to build gradually the analysis in an iterative manner.

Having acquired a deeper level of understanding of the data, and confidence in the categorization, the answers were then organized according to the highlighted mechanisms of leadership but also the context and social wealth concerned categories following the structure:

Contextual Conditions and Early-Stage Constraints

Mobilisation Without Formal Authority

Trust and Legitimacy-Building

Collective Commitment Beyond Incentives

Adaptation and Learning Processes

Capability Development

Social Wealth Creation

Each of the categories contains an internal analysis of what the participants revealed concerning it, for example, under Mobilisation it was considered whether recurring references appeared such as personal networks, informal engagement, shared values etc, and to what extend themes or ideas appeared across data.

Despite the analysis categories already existing, informed by the framework, the participants were not guided towards responding under these exact categories but rather a more general, open context (reflecting the 4 sections presented in 3.4 and seen in detail in the Appendix A). This enabled a more thorough analysis and careful consideration for the categorization of the data, and avoided too closed answers that would harm contextual interpretation and instill bias.

Then, quotations were selected in order to build the argumentation and reveal the ideas, the mechanisms in practice and the contextuality. These quotations as seen in the next chapter, rather than replacing interpretation they support the observations and reinforce the claim that patterns exist and comparison is possible. They revealed practical examples, contextual differences and similarities, recurring patterns and allowed to observe variations in the level/intensity of operationalization of leadership supporting the observations.

Throughout the process of the analysis, notes were kept to pair the recurring ideas, highlighting of excerpts, and comments of interpretation by the researcher.

3.7. Ethical Considerations

The research was conducted with informed participants who were aware of the purpose of it, knew how their responses would be used and the layout of the interview process as well as they were aware and had consented to recording. At any point during the interview, they could interrupt participation or withdraw their consent for the recording, so it remained purely voluntary. As for privacy and confidentiality, the names of the participants were omitted in order to guarantee privacy, and instead the names of the organisations were only kept. The recorded materials (audio files, notes and transcripts) were used only for the specific research accessible by the researcher. Influencing the responses was highly avoided thanks to staying true to the data collection strategy and the AI tools used for the transcriptions were carefully and manually verified.

3.8. Methodological Limitations

Within the methodological limitations to be acknowledged, lie the retrospective interviews (some of them), the sample size, the geographical scope, and the interpretive bias.

Starting with the first, the case of some retrospective interviews, memory bias could affect the responses, but that was mitigated by encouraging a detailed reflection, involving the direct founder in the interview and probing some questions to help reveal unbiased data.

Then, regarding the sample size, the small sample limits the breadth of the coverage and does not allow aa statistical generalization. But this size at the same time allows for a qualitative depth, a possible comparison and rich narratives.

Passing to the geographical scope, engaging participants only from Greece and Portugal limits the transferability to the pan-European context. But at the same time, due to the fact that the two countries share similar institutional contexts and comparative conditions this allows a cross-analysis and a good representation of South Europe.

FInally, regarding the interpretive subjectivity, the strong role of the researchers interpretation could influence which parts of the data are highlighted and paid attention to, what quotes were selected or how things were interpreted. The mitigation comes from a careful, unbiased analysis with strong elements of repeated reading, use of notes, cross-comparison, and staying close to the actual responses.

4. Chapter 4 - Results from the interviews

4.1. Introduction

This chapter is the transition from the theory and methodology to the actual findings of the research. It contains the data that emerged from the semi-structured interviews that were conducted with founders of social enterprises operating in the European context (Greece and Portugal), focusing on leadership in early-stage foundation of social enterprises. The data have been categorized in a way that reflects the theoretical structure (as explained in the methodology) and observations are shared for the contextual conditions, mobilization, trust/legitimacy, commitment, adaptation/learning, capability development and social wealth. The findings are presented in a descriptive and data-driven manner, supported by selected excerpts from the interviews. Full interview transcripts are available in the appendices.

4.2. Contextual Conditions and Early-Stage Constraints

Within all of the interviews, the most characterizing element of the early phases for the social enterprises has been the lack of resources, uncertainty about the tentative and the need to build everything from scratch – basically starting from ground zero.

The most highlighted limitation, naturally, emerged to be the lack of financial resources. Several participants reported starting with minimal financial means, often having to rely on personal contributions or voluntary work. As one participant explained, *“we started with a very small personal investment… there were no grants available… we had to build everything ourselves”*. Similarly, other participants described that *“at the beginning, the main challenge was the lack of resources…”,* also another one mentioned *“the small team would be involved voluntarily in the whole project”*, all of these adding to highlight the absence of financial incentives in the early phase.

Moreover, the lack of organizational infrastructure was particularly emphasized since several founders mentioned that they had to work on developing at the same time not only the structure of the social enterprise, but also to establish operational processes and define roles. As highlighted by one participant, the challenge of "structuring almost everything from scratch," including systems, partnerships, and communication channels was really intense. In another case, the absence of physical spaces was referenced as a key constraint that required the organisations to create or transform places for the activities.

Meanwhile, there was a strong correlation between the creation of the social enterprises and societal gaps. These gaps included limitations in education systems, lack of access to career guidance, insufficient opportunities for community participation, lack of artistic interventions in society, disadvantaged areas and need for alternative tourism etc. For example, one participant explained that the initiative emerged because *"students were choosing their studies randomly… without proper guidance"*. In another case, the creation of the organization emerged in order to combat the lack of space in the city for alternative forms of art expression in a traditional conservative environment. Another case was to enhance opportunities in inland regions to develop (culturally and touristically) etc, demonstrating a range of goals always linked back to fighting societal problems.

4.3. Mobilisation Without Formal Authority

Throughout the interviews, mobilization was strongly characterized as occurring without formal authority, frequently accompanied by a lack of financial incentives or/and/or structured recruitment processes. It was primarily based, instead, on personal relationships, direct engagement and shared values.

The importance of personal networks was heavily emphasized by several participants, for example, as one participant noted, *"we relied on personal networks… existing relationships… there was no structured strategy - we simply used the resources we had available"*. Similarly, another participant explained that early supporters joined because of "shared values" and prior trust-based relationships.

Mobilisation also involved, in some cases, an active outreach through existing social and institutional channels. Examples include engaging with schools and universities, participating and presenting in conferences, and actively linking with community organisations. In one case, for example, one participant reported that they presented their initiative in academic environments and invited interested individuals to participate through direct interaction.

In other cases, mobilisation occurred through community-based engagement. One participant described going directly into schools to introduce activities, which helped attract participants and collaborators. As explained, *"we went directly into schools… which helped us attract participants"*.

Some participants also referred to more participatory approaches. For example, one organisation described creating opportunities for individuals to contribute to the design of activities, which increased their involvement and sense of ownership.

The observed data allow to infer that mobilization is leaning towards an interaction-based and relational process rather than a formal structured one. Despite the approaches being unique each of them, trust, personal networks, and shared purpose seem to have replaced formal authority in that initial state, and this was observed to be implemented with varied approaches but sharing same principles.

4.4. Trust and Legitimacy-Building

A gradual and multi-dimensional process, is the most fitting way to describe the building of trust and legitimacy with the community and supporters, as revealed in the interviews. As indicated throughout the responses of the participants, credibility was not something that existed at the beginning of the social enterprise, but rather developed over time through a combination of actions, relationships, and recognition.

The biggest role in building this trust with the community and supporters, as revealed by several participants, played the part of demonstrating actual results. As one participant explained, *"trust was built through results… once we started implementing projects… people could see the value of our work"*. Similarly, another participant highlighted that delivering "small but high-quality initiatives early" was important for gaining recognition.

In order to strengthen even further the credibility, many participants highlighted the use of partnerships as a key mechanism. Working with established organisations, institutions, and local actors allowed to gain this boost and be seen as more credible. For example, one participant mentioned that collaborating with external partners helped *"gain credibility and legitimacy"* in the early stages. In another case, the creation of a consultative council involving key institutions contributed to strengthening the organisation's position within the community.

On the same level of importance stand the dynamics of the relations. As many participants described, direct interaction, transparency, and responsiveness to stakeholders' needs helped to build trust. One organisation reported focusing heavily on *"forming genuine relationships… by listening to their needs and co-designing activities"*.

The findings reveal how trust and legitimacy followed a multidimensional approach to be constructed and was not only a straightforward action but rather a combination of multiple and complementary processes, including performance, partnerships, and relationships.

4.5. Collective Commitment Beyond Incentives

Observed across interviews is the fact that the drivers for commitment have not been focused on the financial incentives but primarily intrinsic motivation, engagement with the organizations' purposes and values that are shared among participants.

Heavily linked by several participants has been the commitment to being aligned with the social enterprise's mission. As noted, involvement was sustained through *"belief in the mission and shared values"*. Similarly, *"purpose-driven engagement beyond financial incentives"* as a key factor in maintaining participation.

Commitment was also associated, in some cases, with personal interest and relevance. One participant explained that the organisation's activities were closely linked to personal concerns, which reinforced motivation and long-term involvement.

Learning opportunities appear as an additional motivator, where involvement in projects allowed individuals to develop skills, contribute to outputs such as publications, and gain experience within their field.

In other cases, commitment was linked to shared responsibility. As one participant described, *"there was no safety net… everyone was fully invested"*, which created a strong sense of collective responsibility.

The above observations show how a combination of purpose, shared responsibility, personal relevance and learning opportunities managed to create and sustain commitment.

4.6. Adaptation and Learning Processes

Described throughout the interviews, by all participants, is the adaptation as an ongoing and integral part of the development of the social enterprises. Instead of narrowly following pre-defined strategies, the approaches have been adjusted frequently in response to challenges, feedback, and dynamically changing conditions.

Highlighted by one organisation is how they decided to modify their educational approach after recognising that initial activities were *"too theoretical…"*, This led to adopt more experiential and participative methods improving the engagement of the community. Another participant explained how they refined their mobilisation strategy by targeting more specific groups rather than addressing a broad audience.

In one of the cases, it was external factors that dictated a change in the practices, since their involvement in European programmes introduced new perspectives and led to a shift in organisational focus from cultural activities to broader community development.

Moreover, as another participant described, the growing trend of the organization required to introduce more clear structures, formalize the internal processes and redefine the roles to accompany the accelerated expansion at the beginning, indicating another case of internal driven adaptation.

Observed across the cases is the fact that adaptation appears as a continuous process and not as a single event. It actually seems to be embedded in everyday practices of the social enterprises.

4.7.Capability Development

Across the interviews, capability development was discussed with high relevance and emerged consistently, although with differences in the approaches and levels of structured implementation.

In most of the cases, learning occurred through direct involvement in activities. Participants described developing skills through participation in projects and practical experience *"we worked together during projects… provided continuous feedback… development was hands-on"*.

Some social enterprises though, implemented a more structured approaches where for example, as explained by one of the participants, internal training and mentoring was implemented to enable individuals to develop competencies and take on new responsibilities.

Another way that capability development was implemented, in some cases, involved support through partnerships. This was implemented by collaborations with external actors, such as institutions or professionals, to provide training in areas including for example communication, entrepreneurship, and professional skills.

The observed data allow to characterize the capability development across cases both as an intentional activity and as a natural outcome of participation in organisational processes.

4.8.Social Wealth Creation

Various forms have been described as instilled change in the surroundings (communities and environments) through the action of the social enterprises. Although, the level and variety of change are conditioned by the early-start stage.

Regarding the individual level, participants reported improvements in skills, confidence, and professional capabilities. As one participant mentioned, involvement in the organisation led to "new skills… greater visibility… more contacts and relationships". In another case, participants improved their professional practice through access to practical tools and resources, leading to better outcomes in their work with clients.

At the community level, some participants described increased collaboration and stronger networks. One participant explained that organisations began to "see value in working together… creating a stronger ecosystem".

However, the outcomes were not reported to be fully developed in all. This was linked, by the participants arguments, to the fact that organisations at their early stages are focusing on building the foundations for future impact. An example noted, is that it was "premature to claim profound changes already demonstrated".

As such, the findings indicate that social wealth was present in different forms and stages, ranging from early capability development to broader community-level changes.

5. Chapter 5 - Discussion and Recommendations

5.1. Introduction

This chapter deepens into a discussion to interpret the findings observed, and associate them with the theoretical framework and model. It also aims to respond to the research questions and explore the alignment with the mechanisms of transformational leadership that are in the core of the thesis.

By observing patterns, common recurring ideas and cross-comparing the interviews, the conclusions can be drawn according to the research methodology presented above.

5.2. Contextual Realities and Early-Stage Constraints

The conceptual model is supported significantly by the findings. As observed across the cases, and aligning with the theory, the environments in which the social enterprises started were characterized by resource scarcity, absence of formal authority, and institutional gaps. Such defining elements played a major role in how leadership was operationalized and enacted.

Resource scarcity, especially concerning the lack of financial stability, turned the leaders focus and effort more towards relying on non-material forms of influence. In a similar way, the absence of formal authority meant that hierarchy or contractual mechanisms were not fit or relevant for the coordination. Because of that, leadership emerged as a process closely linked to relations and grounded in trust, shared purpose and credibility.

Another important role was also played by institutional and societal gaps. These not only acted as triggers for the creation of the organisations, reflecting unmet societal needs in areas related to (but not limited to) education, inclusion, community development. But they also created ongoing challenges that organisations needed to navigate, particularly in terms of legitimacy and access to resources.

The above findings, are in line with the theoretical expectations and confirm the assumption of the model that early stage social enterprises are operating in structurally constrained environments. It is also worth to highlight, that these restrictions although limiting as they may sound, at the same time they are drivers of action and define the very core and nature of the social enterprises, creating conditions that require alternative leadership approaches, particularly those based on relational influence, adaptability, and purpose-driven engagement.

5.3. Leadership Response Mechanisms

Navigating through the empirical findings, it becomes evident that the leadership response mechanisms provided in the conceptual model are strongly supported. These mechanisms appear to be interconnected and mutually reinforcing.

5.3.1. Mobilisation Without Formal Authority

Across all cases, there can be encountered descriptions and reflections of the founders relying on relational influence, personal networks, and shared values to engage individuals and initiate action. This reveals that the founders deeply understood how formal authority was not in line with the early state of their organisations and neither to achieve the intended goals.

The above finding is in line with considering leadership as a process of influence and not as a positional authority, matching with what we can see in Northouse (2019). Moreover, considering the empirical evidence this perspective can be expanded claiming that not only leadership in the early social enterprises operates without formal authority, but even more it actually replaces it.

This form of mobilisation highly reflects elements of transformational leadership, particularly the ability to inspire individuals through purpose and vision, as seen in Burns (1978) and Bass (1985). Individuals were drawn to the initiative through alignment with its mission and not recruited through incentives.

5.3.2. Trust and Legitimacy-Building

A critical enabling mechanism for the survival of the organisations has been the establishment of trust and legitimacy with the community and the supporters. Because credibility was lacking since an early social enterprise is still immature and operates in uncertainty, the founders actively pursued constructing legitimacy through partnerships, actions and the flourishing of relationships to drive engagement.

As such, trust and legitimacy establishment was pursued since all founders understood how important it is as an enabling factor for the organization to survive. The community and supporters needed to see results to start believing in the mission and getting engaged, also to see some return. Moreover, a decisive factor has been the collaboration with recognized actors (eg formal authorities, municipalities, education providers etc) and direct engagement with the target groups that contributed a great deal to build trust and legitimacy.

Legitimacy and trust, as revealed above, can be concluded as an ongoing evolving process that accompanies the social enterprises' development. The findings suggest that it precedes often measurable impact and is of utmost importance to be established before pursuing the scale-up of activities or demonstration of broader outcomes.

5.3.3. Collective Commitment

Transcending the financial incentives, the collective commitment has been sustained instead by instilling intrinsic motivation, alignment with the organisation's mission, shared values, purpose, and relational ties. This is in line with the theoretical expectation of inspirational motivation within transformational leadership playing a major role in the survival of the social enterprises' core.

Moreover the findings also suggest that commitment is reinforced by interpersonal relationships and a sense of belonging within the organisation. This sense of belonging in some cases was even heightened by implementing heightened responsibility and sharing ownership.

The above indicate that commitment in early-stage social enterprises is both value-driven and context-dependent.

5.3.4. Innovation and Learning

Derived from the research findings, innovation and learning have accompanied strongly the organisations' evolution, and stayed in par with the intensity of the continuous adaptation, experimentation, and responsiveness to the surrounding changing conditions.

As such, a clear reflection of the dimension of intellectual stimulation within transformational leadership is verified, where individuals are encouraged to question assumptions and develop new approaches in order to pursue the SE goals. Furthermore, innovation was not limited to strategic or technological changes but also strongly included social and organisational adaptations.

Leadership was therefore enacted through ongoing learning processes, enabling organisations to navigate uncertainty and refine their practices over time.

5.3.5. Capability Development

The interviewed founders reflected upon the importance of creating environments in which individuals could develop skills, take initiative, and grow through participation. Believing in the people and working with them has been a central idea, strengthening the believe that a combined effort and personal evolution are needed for the social initiatives to go forward.

This is in alignment with the individualised consideration dimension of transformational leadership, where leaders support the development of individuals. The findings, though not only confirm this mechanism but also extend the perspective by showing that capability development constitutes as well a key pathway through which social value begins to emerge.

Thus capability development emerged as both a leadership mechanism and an outcome.

5.4. From Leadership to Social Wealth Creation

Across cases, the findings suggest that leadership in early-stage social enterprises, contributes to a gradual creation of social wealth, but this process does not emerge in the same way in all cases and contexts. In the conducted interviews, the founders shared reflections on a broad range of educational, training and capability-building initiatives that they implemented with their social enterprises and that contributed to changes in the human, social and intellectual capital.

Concerning the human capital, activities linked to developing skills, empowerment and learning have been highlighted in all cases. These were operationalized through various formats of delivery including workshops on entrepreneurship, sustainability, digital skills, communication, youth empowerment, career counselling, training for educators and psychologists, as well as participatory learning activities. It was fairly highlighted that the actions resulted in an obvious rise of skills, confidence, competencies and preparing the participants to more actively participate in actions within their communities.

As for the social capital, it can be associated with the frequently described results of stronger collaboration between actors, increased participation, new partnerships and greater community engagement. Many of the founders reported that with the passage of times and the results pilling up, the community engagement raised to the point that participation was not sought by the organisation but the community has been reaching out to the social enterprise, for example attracting schools, municipalities and local organisations seeking cooperation. This is suggestive of the fact that when leadership mechanisms are grounded in trust, mobilisation and legitimacy-building, they contribute to the strengthening of networks and collective engagement.

Regarding the intellectual capital, it was revealed that the innovation brought by the social enterprises in trying to solve the confronted social challenges, had led to the creation of new knowledge, educational methods, tools and organisational practices. The organisations acted as test beds ideating and implementing new approaches or by facilitated knowledge exchange among participants and institutions to act as enablers for solving problems. Despite the intensity and maturity across cases varying, the important outcome is that the general knowledge had either been raised or the mechanisms set in place to cause this raise in the future in a broader way embracing the community.

Finally it is important to refer to the temporal dimension of the social wealth creation. Especially, in this study of looking to the early stage creation of the social enterprises, the participants acknowledged the fact that measurable impact was still developing and that it would be premature to claim fully demonstrated outcomes. Instead, leadership appeared to contribute primarily to the creation of conditions through which social wealth may emerge over time.

Thus, instead of seeing the social wealth as an immediate and raised outcome, it is derived from the dissertation findings that it develops progressively and in parallel with organisational maturity. Social wealth creation in early-stage social enterprises is not static but evolving, emerging gradually through leadership practices and collective participation.

5.5.Model Evaluation and Theoretical Contribution

The findings overall appear to be broadly aligned with the conceptual model in test particularly regarding the relationship between contextual constraints, leadership mechanisms and the gradual creation of social wealth. At the same time the empirical findings of the research allow for further discuss and extension of the original framework.

The leadership dimensions, as seen in the model, have frequently appeared interconnected and mutually reinforcing. Legitimacy-building also emerged as particularly central, often preceding mobilisation and broader engagement. In addition, leadership appeared to compensate for the absence of formal structures and material resources, becoming an enabling force for coordination and organisational development.

Regarding social wealth, instead of seeing it as a fully blown result, it is suggested to better consider it as an ongoing accompanying evolution where the more mature the organisations become the more obvious their impact becomes.

Fundamentally, these observations do not prompt any alteration in the model but rather confirm it and offer a grounded understanding of how transformational leadership operates under conditions of uncertainty, scarcity, and organisational emergence.

5.6. Answer to the Research Question

The goal of this study was to deepen into leadership as an enabling factor for forming social enterprises, and how it contributes to the creation of social wealth during the early stages of the organisational developmet.

Extracted from the dissertation findings comes the suggestion that leadership operates as an enabling and coordinating force within contexts characterised by uncertainty, limited resources and absence of formal authority. Instead of relying on hierarchy or material incentives, founders mobilised individuals through shared purpose, trust and relationships while staying continuously alert for adapting to changing conditions and organisational needs. Legitimacy-building also emerged as particularly important, allowing organisations to gain credibility and sustain participation despite operating in uncertain environments.

As for the creation of social wealth, it has been derived from the dissertation findings that the way leadership contributes is less through direct production of outcomes and more through the gradual creation of enabling conditions. Capability-building, learning opportunities, collaboration, and community engagement appeared across cases, although not always at the same level of maturity. Social wealth, therefore, emerged more as an evolving process than as an immediate result, particularly within early-stage organisations.

Considering together the above answers to the research questions, it becomes evident that leadership in early-stage social enterprises acts as a central mechanism for transforming ideas into collective action and conditions for social value to gradually emerge.

6. Chapter 6 - Conclusions

6.1. Conclusion

The present study explored the manner in which leadership acts as an enabler for social enterprises early formation and also contributes to emerging social wealth. After an analytic literature review, and a definition of a conceptual model, a research methodology was followed that included conducting interviews with founders of social enterprises from Greece and Portugal to examine how leadership was enacted under the characteristic conditions, especially the constraints, that an early SE faces.

As discussed in the thesis, the findings imply that leadership has a central role in enabling the early stage social entrepreneurship, and the mechanisms under which it is operationalized allow for the organisations to address common contextual challenges. This set of interrelated and mutually reinforcing mechanisms can be considered to fully navigate the operational context and not only to design but also to anticipate strategies.

Relational and influence-based processes have emerged as means to not rely on formal structures or financial incentives that would not fit the nature of an early-stage social enterprise. Leaders, instead, mobilise individuals through shared values, personal networks, and a clear sense of purpose making up for the existing constraints.

At the same time, trust and legitimacy play a central role since the organisations need to establish credibility through consistent actions, partnerships, and engagement with stakeholders before they pursue broader impact. This is a foundational action, enabling further development and expansion of activities.

Regarding commitment, it was highlighted how it is sustained through intrinsic motivation and alignment with the organisation’s mission. Participants remained involved mainly thanks to shared belief in the purpose of the initiative and the relationships developed within the organisations.

Finally, through continuous learning, innovation and adaptation the social enterprises avoid following linear or predefined strategies, but rather evolve through experimentation, learning, and responsiveness to changing conditions. Leadership therefore, involves not only providing direction, but also facilitating ongoing adjustment and learning.

When it concerns the social wealth, it was approached as a concept more related to education and knowledge, touching the human capital, the social capital and the intellectual capital and examined how across the cases it was affected through the actions of the social enterprises. This revealed that in the early stages it is more relevant to examine the signs of setting up the ground for future impact, while acknowledging that the social value is raised proportionally to the maturity of the social enterprises’ interventions.

6.2. Contributions of the study

The main contribution of the study to the literature on leadership and social entrepreneurship, comes from offering an empirically grounded understanding of how leadership operates in early-stage contexts.

The findings reinforce the relevance of transformational leadership in the case of social enterprises, while examining its enactment exactly in these contexts characterised by structural constraints.

Moreover, the study contributes to a more context-sensitive understanding of leadership by demonstrating that leadership practices are shaped by the specific conditions in which organisations operate. Rather than applying universal models, leadership in social entrepreneurship appears to be embedded in and responsive to its environment.

Then, the study refines the concept of social wealth by emphasising its processual nature. Instead of being viewed solely as an end result, it begins to emerge through intermediate processes such as capability development, learning, and relationship-building.

The findings also highlight some of the aspects that social entrepreneurs should prioritise, and that is relational strategies, particularly in the early stages of organisational development. Building trust, engaging stakeholders, and creating opportunities for participation appear to be more effective than relying on formal structures or incentives. In addition, the importance of adaptability highlights the need for leaders to remain flexible and open to learning as their organisations evolve.

6.3. Leadership Implications for Early-Stage Social Enterprise Development

Leadership in early-stage social enterprises is not a linear process that can rely on predefined plans, but rather dynamic in the way it is enacted in order to enable success and the creation of social wealth. The study provided important findings that suggest how leaders tend to enhance effectiveness by aligning their actions with the organisation's evolving level of development, particularly in contexts characterised by limited resources and unclear structures.

As observed in the dissertation findings, social enterprises early face a contextual multitude of challenges, including resource scarcity, lack of strategic clarity and lack of organizational structure. The focus here lies in activating the initiative without incurring unnecessary delays or costs. Addressed in the research findings, it is highly recommended for founders to address this by prioritising small-scale, low-resource activities, such as pilot initiatives or informal engagements, while building on personal networks to generate early participation. This approach allows organisations to test ideas in practice, create visibility, and build initial momentum, thereby accelerating development while minimising upfront resource commitments.

Derived from the findings, we then notice that with a raise in the participation in the social initiative, the challenge that emerges is how to establish legitimacy and build trust when formal recognition is lacking due to the early state of the social enterprise. What the study suggests is that the leaders should focus on raising the involvement of participants and the community rather than pursuing formalisation channels. Because when engagement flourishes in activities and co-creations occur, legitimacy is gained through real, visible action. This even strengthens further commitment and allows for a better consolidation of the organisation's position within its contextual environment.

With more consistent participation comes naturally a higher demand for better coordination and structural organization, though in a way that does not cancel organisational flexibility. Though, rather than focusing on introducing rigid roles and predefined structures, alignment can be achieved by naturally allowing a role's progression and emergence based on the real contributions. Organisational unity can further be reinforced by instilling a strong shared sense of purpose and supporting learning through participation. This can avoid issues that would occur if an early formalization were forced.

Finally, extracted from the dissertation findings, when organisational activity becomes more visible, the challenge evolves towards translating credibility into access to opportunities, resources, and partnerships. At this stage, legitimacy begins to function as a strategic asset. The findings suggest that leaders can build on this by forming partnerships with credible actors, demonstrating consistent outputs, and positioning the organisation within relevant networks. In doing so, legitimacy is not only reinforced but actively utilised to support growth and external alignment.

Across all stages, the need to operate under changing conditions makes adaptation a central leadership requirement. The findings consistently indicate that leaders who maintain flexibility by adjusting activities, refining approaches, and responding to feedback are better positioned to sustain organisational development. This iterative approach reduces the risk of inefficiencies associated with rigid planning and allows the organisation to evolve in alignment with its context.

6.4. Limitations and future research

Considering the findings of this research study, the readers should keep in mind that the conclusions should not be taken as universally generalizable, but rather be considered as valuable for the insight they offer into context-rich data. The qualitative exploratory design of the study generated insights from 6 founders of social enterprises within Greece and Portugal enabling retrospective reflections and contributing to the sector’s knowledge.

The dissertation’s results lay the groundwork to be considered on future studies that aim to broaden the empirical basis in a more global context. This could be achieved in several ways, more importantly by extending the research to include other European countries, a larger sample, longitudinal research following founders from idea to growth, quantitative testing of the leadership mechanisms that emerged from this study, comparisons between different sectors and/or legal forms of organizations and companies and finally accompanying some targeted samples in order to examine later organizational stages.

Despite the limitations of the research (also presented in chapter 3.8), the emerged conceptual model offers considerable potential and could further be refined and examined across different social enterprise contexts, but also support the empirical testing of the proposed leadership mechanisms. Furthermore, the understanding of leadership in the context of early social entrepreneurship can be deepened and the evidence strengthened for the development of more effective support frameworks for founders, social enterprises and public policy.

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Appendix A – Semi-structured questionnaire

SECTION A – Context & Startup

A1 Can you describe how your (social) enterprise/company started and what problem it aimed to address?

A2 What were the main challenges you faced during the early stage?

A3 At that time, what resources and authority did you actually have?

SECTION B – Leadership & Mobilisation

B1 How did you convince people to join or support the initiative in the beginning?

B2 How did you build trust and legitimacy within the community?

B3 How did you communicate your vision during the startup phase?

B4 Can you describe a moment where you had to adapt or rethink your approach, and how you involved others in that process?

B5 In what ways did you mentor, support or develop the capabilities of people involved in the organisation?

SECTION C – Commitment & Sustainability

C1 Why do you think people remained committed despite limited incentives?

C2 What do you believe was the key leadership factor that allowed the organisation to stabilize?

SECTION D – Social Wealth

D1 What types of education, training or capability-building initiatives has your organisation developed, particularly during the early stage?

D2 In what ways have individuals or the community changed because of these initiatives?

Appendix B - Interviews

Interviews were audio-recorded and transcribed using automated transcription software, followed by manual verification and correction by the researcher

INNOVATION HIVE (Greece)

SECTION A – Context & Startup

A1 Can you describe how your (social) enterprise/company started and what problem it aimed to address?

(For example: what motivated the initiative, how the idea first emerged, and who was involved in the early stages.)

The company was mainly founded out of the founders' need to have control over decisions and the way things are done. Each of us had a strong entrepreneurial drive and a desire to work independently, rather than following instructions from others.
In essence, the initiative was born from the need to be "our own bosses" and to shape our work according to our own vision.
Of course, we also relied on previous professional experience. Starting completely from zero—without knowledge of the sector, without a network, and without relevant skills—is very different from starting with some foundation. In our case, we already had partial experience: we understood the sector, had developed soft skills, and had an initial network.
So, combining this personal motivation with our passion for the work, we decided to create the company. Our goal was to integrate **business innovation and social innovation**—to connect entrepreneurship with societal impact in a meaningful way.

A2 What were the main challenges you faced during the early stage?

(For example: lack of resources, institutional barriers, difficulties in mobilising people, or uncertainty about how to move forward.)

At the beginning, the main challenge was **financial sustainability and funding**. When you start something new, you often begin without a salary, which is a risk. We knew that for several months we might not be paid.
Another challenge was timing. We officially launched the company around mid-2020, during the COVID-19 pandemic. This created uncertainty, especially regarding mobility and networking, as we couldn't attend events, travel, or build partnerships easily.
However, COVID was also an opportunity, since specific funding calls were introduced.
In terms of bureaucracy, setting up the company was relatively straightforward. The main difficulty was opening a bank account due to our legal form (a non-profit organisation). In Greece, the legal framework for non-profits is unclear, and banks are not always familiar with such entities. This caused delays, but not major obstacles.
Internally, there were no significant conflicts among the founders regarding vision or collaboration.

A3 At that time, what resources and authority did you actually have?

(For example: financial resources, networks, volunteers, partnerships, or any formal or informal influence you could rely on.)

We didn't have significant formal resources, but we had strong **team cohesion and shared values**.
We were all young, of similar age, and already knew each other. The working environment was informal, flexible, and based on mutual respect rather than hierarchy.
Decision-making was democratic, and this approach has remained even as the organisation grew to around 24 people.
We did not rely on volunteers for core work. Volunteers were occasionally involved in activities like events or travel, but all operational work was done by committed team members.

SECTION B – Leadership & Mobilization

B1 How did you convince people to join or support the initiative in the beginning?

(For example: volunteers, community members, partners, organisations, or early supporters.)

In the first 1–1.5 years, we were not very externally focused. We concentrated on internal work—mainly project development and securing funding through proposals.
Once we established a stable portfolio of projects, we began focusing on external engagement. We signed **Memorandums of Understanding (MOUs)** with local and international organisations and started organising events, including collaborations with municipal youth councils.
These partnerships helped increase our visibility and credibility.

B2 How did you build trust and legitimacy within the community?

(For example: relationships with local actors, transparency, partnerships, or demonstrating commitment to the mission.)

Trust was built mainly through collaborations with recognised organisations. Working with established partners helped us gain credibility and legitimacy in the ecosystem.

B3 How did you communicate your vision during the startup phase?

(For example: meetings, events, storytelling, presentations, or personal conversations that helped others understand the mission.)

We used two main approaches:

1. **Personal relationships**
   We first communicated our vision to people who already knew and trusted us. Since we had prior collaborations, it was easier to explain what we were building and maintain continuity.
2. **Structured communication tools**
   We developed a clear website, portfolio, and presentations explaining who we are and what we do in a simple and concise way.

Over time, our work spoke for itself. As we delivered results, trust increased, and new collaboration opportunities emerged.

B4 Can you describe a moment where you had to adapt or rethink your approach, and how you involved others in that process?

(For example: when an initial idea did not work as expected and the team had to change direction or experiment with a new solution.)

As the organisation grew rapidly (from 3–4 people to over 20 within about a year), we had to shift from an informal structure to more **formal processes and transparency**.
For example:

- clearer role definitions
- structured procedures
- transparency in responsibilities and working conditions

Additionally, we had to adapt our business model. Initially, roles such as project writing and project management were separate. However, due to changes in funding structures (e.g. Erasmus project limits), we had to combine roles.
This allowed us to:
- maintain team stability
- avoid layoffs
- support employee development

Adaptation was necessary to respond to external changes.

B5 In what ways did you mentor, support or develop the capabilities of people involved in the organisation?

(For example: training, guidance, skill development, encouraging participation, or helping people take on new responsibilities.)

We implemented **internal training systems**.
Each team member had:
- internal training opportunities
- a mentor or cluster leader
- guidance from more experienced colleagues

This ensured continuous learning and skill development within the organisation.

SECTION C – Commitment & Sustainability

C1 Why do you think people remained committed despite limited incentives?

(For example: shared values, belief in the mission, relationships within the team, or the social impact of the initiative.)

Commitment was driven by **shared belief and necessity**.
At the beginning, there was no safety net—everyone was fully invested in making the organisation succeed. If something failed, there was no backup plan. This created a strong sense of responsibility and collective commitment.

C2 What do you believe was the key leadership factor that allowed the organisation to stabilize?

(For example: a particular decision, leadership behaviour, strategy, or moment that helped the organisation move from an idea to a stable initiative.)

A key factor was the **prior experience of the founders**.
In the early stages, most work involved project implementation. Because leadership had relevant experience and knew what they were doing, this created credibility and trust within the team.
When people see that leaders are competent, it changes how they perceive and follow them.

SECTION D – Social Wealth

D1 What types of education, training or capability-building initiatives has your organisation developed, particularly during the early stage?

(For example: workshops, mentoring programs, skills training, educational activities, or awareness initiatives.)

The organisation implemented various educational initiatives, mainly through projects.
These included:

- workshops on entrepreneurship
- digital skills training
- programmes for different target groups

Two particularly important areas were:

- **entrepreneurship education**
- **digital skills training for senior citizens**, often using gamification approaches

D2 In what ways have individuals or the community changed because of these initiatives?

(For example: new skills, improved opportunities, stronger community relationships, increased confidence, or new ways of solving local problems.)

Participation increased mainly through:

- visibility from previous projects
- strong partnerships with local organisations

As a result, people became more engaged without needing to be actively recruited.

EUPAIDEIA (Greece)

SECTION A – Context & Startup

A1 Can you describe how your (social) enterprise/company started and what problem it aimed to address?

(For example: what motivated the initiative, how the idea first emerged, and who was involved in the early stages.)

EUPAIDEIA was founded due to a shared concern that traditional education systems were not adequately preparing individuals to address today's complex global challenges such as climate change, social inequality, and rapid digital transformation. The idea emerged through collaboration among educators, researchers, and social practitioners who recognized the need for a more holistic, interdisciplinary approach to learning, inspired by the ancient Greek concept of "paideia."

In its early stages, a very small group of 2-3 like-minded professionals came together with the common goal of promoting sustainable development through education. What motivated us was the gap between knowledge and action, especially in Greece. People were aware of global issues, but lacked the practical skills and mindset to contribute to meaningful change. EUPAIDEIA was created to bridge that gap by equipping individuals with the competencies needed to actively participate in building a more sustainable and inclusive society.

A2 What were the main challenges you faced during the early stage?

(For example: lack of resources, institutional barriers, difficulties in mobilising people, or uncertainty about how to move forward.)

One of the main challenges was the lack of stable financial resources, which made it difficult to plan long-term and scale our activities. Our main income sources were funds from the EU, so basically the operational model was project based and uncertain. And this also caused difficulties in mobilising people internally.

So, there was a degree of uncertainty in defining our operational model, meaning how to translate our vision into concrete, impactful actions while remaining flexible and innovative. Overcoming these challenges required persistence, and collaboration and basically meant that during its first year or so of operation the small team would be involved voluntarily in the whole project.

A3 At that time, what resources and authority did you actually have?

(For example: financial resources, networks, volunteers, partnerships, or any formal or informal influence you could rely on.)

Minimum resources - basically from the three founding members. But at the same time a solid background on preparing EU funding proposals based on real needs at the local and national level. So the first year of operation was basically preparing funding proposals and organising the first set of trainings dedicated to teachers. We also had a team of dedicated volunteers that helped with the organisational aspects of the trainings

SECTION B – Leadership & Mobilization

B1 How did you convince people to join or support the initiative in the beginning?

(For example: volunteers, community members, partners, organisations, or early supporters.)

We relied heavily on personal networks and trust-building. Many of our early supporters (volunteers, educators, and partners) joined because they shared similar values and were looking for a meaningful way to engage. We created opportunities for co-creation, allowing people to shape activities with us, which increased their sense of ownership and commitment.

At the same time, we emphasized collaboration over competition, positioning EUPAIDEIA as a complementary actor within the ecosystem. By demonstrating openness, credibility, and a clear vision, we gradually built partnerships and a community of people who believed in the initiative and wanted to support its growth.

B2 How did you build trust and legitimacy within the community?

(For example: relationships with local actors, transparency, partnerships, or demonstrating commitment to the mission.)

We built trust and legitimacy gradually through consistency, transparency, and meaningful collaboration. From the outset, we focused on forming genuine relationships with local actors (educators, youth groups, NGOs, and institutions) by listening to their needs and co-designing activities rather than imposing solutions.

We were also very intentional about being transparent in our goals, processes, and use of resources, which helped establish credibility, especially in the early stages. Delivering small but high-quality initiatives early was key; it allowed us to demonstrate our commitment and translate our values into tangible impact.

Finally, partnerships played a crucial role. By collaborating with trusted organizations from across the EU and locally and participating in broader networks, we strengthened our legitimacy and positioned EUPAIDEIA as a reliable and mission-driven actor within the community.

B3 How did you communicate your vision during the startup phase?

(For example: meetings, events, storytelling, presentations, or personal conversations that helped others understand the mission.)

During the startup phase, we communicated our vision primarily through direct, personal engagement. Small meetings, workshops, and one-to-one conversations were essential in helping people understand not just what we do, but why it matters. These interactions allowed us to adapt our message to different audiences and create a more meaningful connection.

In addition, presentations and participatory events played an important role. Rather than simply presenting ideas, we invited people to actively engage, reflect, and contribute. This made the vision more tangible and fostered a sense of shared purpose from the very beginning.

B4 Can you describe a moment where you had to adapt or rethink your approach, and how you involved others in that process?

(For example: when an initial idea did not work as expected and the team had to change direction or experiment with a new solution.)

A key moment came early on when we realised that some of our initial educational activities were too theoretical and not sufficiently engaging for participants. While the content was aligned with our values, the impact was limited because people found it difficult to translate knowledge into practical action.

In response, we rethought our approach by shifting towards more experiential and participatory methods—such as workshops based on real-life challenges, collaborative problem-solving, and hands-on learning.

B5 In what ways did you mentor, support or develop the capabilities of people involved in the organisation?

(For example: training, guidance, skill development, encouraging participation, or helping people take on new responsibilities.)

We placed strong emphasis on learning by doing, creating an environment where people could actively develop skills through real involvement in projects. Team members and volunteers were encouraged to take on responsibilities early on, with guidance and support, allowing them to build confidence and practical experience.

Importantly, we aimed to empower individuals rather than direct them. By encouraging initiative, creativity, and participation in decision-making, we supported people in developing both their professional skills and their sense of ownership and responsibility within the organisation.

SECTION C – Commitment & Sustainability

C1 Why do you think people remained committed despite limited incentives?

(For example: shared values, belief in the mission, relationships within the team, or the social impact of the initiative.)

People remained committed primarily because they strongly identified with the mission and values of the organisation. The focus on sustainability, social inclusion, and meaningful education resonated deeply with individuals who were looking for purpose-driven engagement beyond financial incentives.

Equally important was the sense of community we built. Relationships within the team were based on trust, collaboration, and mutual respect.

C2 What do you believe was the key leadership factor that allowed the organisation to stabilize?

(For example: a particular decision, leadership behaviour, strategy, or moment that helped the organisation move from an idea to a stable initiative.)

Very important was fostering a participatory leadership approach. By involving team members and partners in decision-making, we created a sense of shared ownership and responsibility, which strengthened commitment and continuity.

As a leadership model closer to the "servant leader" we always put people first, and this allowed the team members to be equally committed and engaged.

Finally, a strategic shift towards building stable partnerships and securing structured funding streams played a crucial role. This allowed us to move from short-term, ad hoc activities to more consistent and sustainable operations, providing the foundation for the organisation to stabilise and grow.

SECTION D – Social Wealth

D1 What types of education, training or capability-building initiatives has your organisation developed, particularly during the early stage?

(For example: workshops, mentoring programs, skills training, educational activities, or awareness initiatives.)

During the early stages, we focused on developing interactive and experiential learning activities that combined sustainability with practical skill-building. These included workshops on topics such as sustainable development, climate awareness, and social inclusion, often designed with a strong participatory element.

We also implemented non-formal education approaches, such as group exercises, simulations, and collaborative projects, to help participants develop transversal skills like critical thinking, teamwork, and problem-solving. In parallel, we organised training sessions for youth workers and educators, equipping them with tools and methodologies to integrate sustainability into their own practices.

Additionally, we promoted peer-learning and mentoring within our activities, encouraging participants to exchange knowledge and take active roles. These initiatives were designed not only to raise awareness but also to build the practical competencies needed for active participation in society.

Every year we organise the EUP ACADEMY - a series of courses in a small rural town in Greece, where participants from across the EU (educators at all levels) participate. The content relies heavily on experiential learning, outdoors education (in a forest nearby) and integration of arts practices into the educational process so that learners can develop agency, confidence and community experience

D2 In what ways have individuals or the community changed because of these initiatives?

(For example: new skills, improved opportunities, stronger community relationships, increased confidence, or new ways of solving local problems.)

Our initiatives have had a noticeable impact on both individuals and the wider community. Participants often develop new skills, such as critical thinking, problem-solving, teamwork, and practical sustainability competencies, which they can apply in everyday life or professional contexts.

Many individuals also report increased confidence and motivation to take initiative, whether in their schools, workplaces, or local communities. The participatory nature of our programs strengthens relationships, fostering networks of collaboration and a sense of shared responsibility for local challenges.

At the community level, our activities have helped people approach problems more creatively and collectively, encouraging solutions that are both practical and sustainable. Overall, participants leave with not just knowledge, but the tools and mindset to actively contribute to social and environmental change

PROGRESSUS (Greece)

SECTION A – Context & Startup

A1 Can you describe how your (social) enterprise/company started and what problem it aimed to address?

(For example: what motivated the initiative, how the idea first emerged, and who was involved in the early stages.)

Our organisation started primarily from the need to address the issue of **career orientation**.

In Greece, this concept was quite misunderstood. Students were often choosing their studies randomly, or based on parental influence, without proper guidance or understanding.
So, we began by conducting research to identify:

- what skills are actually required at different stages
- what is missing in the current system

With the rapid changes brought by digital transformation, we realised that both students and young adults lacked the necessary information to make informed decisions.
At the same time, parents were also unable to guide their children due to these new and evolving conditions.
So, the idea emerged from this shared need—to help young people make better educational and career choices. From there, we expanded into European projects to further develop and sustain our activities.

A2 What were the main challenges you faced during the early stage?

(For example: lack of resources, institutional barriers, difficulties in mobilising people, or uncertainty about how to move forward.)

The main challenge was **financial**.
We started with a very small personal investment—around €1,000 each. We agreed to test the idea for about two years and then decide whether to continue.
There were:

- no grants available at the time
- no external funding sources
- no existing infrastructure

We had to build everything ourselves, including our tools and systems.
This is why we turned to **European programmes**, hoping they would provide financial support and help us grow.
Another challenge was:

- limited networks
- low visibility

These made it difficult to promote the organisation in the early stage.

A3 At that time, what resources and authority did you actually have?

(For example: financial resources, networks, volunteers, partnerships, or any formal or informal influence you could rely on.)

Initially, it was just the two of us.
Later, when we started writing proposals (before receiving funding), we received informal support from:

- postgraduate students
- volunteers

These individuals were interested in contributing, with the understanding that they would be involved if funding was secured.
This support was completely informal, without formal contracts or structures.

SECTION B – Leadership & Mobilization

B1 How did you convince people to join or support the initiative in the beginning?

(For example: volunteers, community members, partners, organisations, or early supporters.)

We did not rely on sponsors and still do not.
Instead, we relied on:
- personal networks
- existing relationships
- participation in associations (e.g., parent associations)

We also:
- presented at conferences
- engaged with university departments
- collaborated with professors

Through these interactions, we communicated our philosophy and invited interested individuals to participate.
There was no structured strategy—we simply used the resources we had available.

B2 How did you build trust and legitimacy within the community?

(For example: relationships with local actors, transparency, partnerships, or demonstrating commitment to the mission.)

Trust was built through **results**.
Once we started implementing projects—particularly in career orientation—people could see the value of our work.
We developed tools and resources (e.g., for educators and counsellors) that were directly useful in practice.
As a result:
- stakeholders recognised our value
- our work was seen as beneficial for their professional activities

So legitimacy came from the **practical impact of our work**.

B3 How did you communicate your vision during the startup phase?

(For example: meetings, events, storytelling, presentations, or personal conversations that helped others understand the mission.)

Mainly through:
- presentations at conferences
- lectures in undergraduate and postgraduate programmes

We did not invest in:
- advertising
- social media promotion

Instead, communication was primarily **face-to-face or direct interaction**, which we believe is more effective.
Even when meetings were online, they were still based on direct engagement.

B4 Can you describe a moment where you had to adapt or rethink your approach, and how you involved others in that process?

(For example: when an initial idea did not work as expected and the team had to change direction or experiment with a new solution.)

We did not face a major failure that forced a complete change.
However, we did adapt our approach when trying to involve people.
Instead of broadly targeting "everyone," we became more **focused and strategic**.

For example:
- if we needed career counsellors → we approached professional associations
- we broke down our needs into smaller, specific target groups

This allowed us to be more effective and efficient in recruitment and collaboration.

B5 In what ways did you mentor, support or develop the capabilities of people involved in the organisation?

(For example: training, guidance, skill development, encouraging participation, or helping people take on new responsibilities.)

Support was mainly provided through **practical mentoring**.
For students and collaborators:
- we worked together during projects
- we guided them step by step
- we provided continuous feedback on their work

For example:
- they would complete a task
- we reviewed it together
- we explained how to improve it

So development was hands-on, practice-based, and feedback-driven

SECTION C – Commitment & Sustainability

C1 Why do you think people remained committed despite limited incentives?

(For example: shared values, belief in the mission, relationships within the team, or the social impact of the initiative.)

For the founders, commitment came from **personal interest and motivation**.
For example:
- topics we worked on were directly linked to our personal concerns (e.g., digital addiction in children)
- the organisation became a way to explore and research these interests

For others involved:
- they gained learning opportunities
- they worked within their field of expertise
- they contributed to publications

Academic outputs (e.g., publications) were also a strong motivation for continued involvement.

C2 What do you believe was the key leadership factor that allowed the organisation to stabilize?

(For example: a particular decision, leadership behaviour, strategy, or moment that helped the organisation move from an idea to a stable initiative.)

Leadership was not hierarchical.
Although we were the founders, the organisation operates in a **collaborative way**.
Key characteristics:
- shared decision-making
- openness to ideas
- inclusion of external expertise

We often:
- propose ideas
- invite others to contribute
- incorporate input from specialists

So leadership is based on **collaboration rather than authority**.

SECTION D – Social Wealth

D1 What types of education, training or capability-building initiatives has your organisation developed, particularly during the early stage?

(For example: workshops, mentoring programs, skills training, educational activities, or awareness initiatives.)

Our main focus has been on **training professionals**, particularly:
- career counsellors
- psychologists working with adolescents

We developed workshops and training programmes to:
- introduce new methods
- help them respond to modern challenges (e.g., digital transformation, future skills)

D2 In what ways have individuals or the community changed because of these initiatives?

(For example: new skills, improved opportunities, stronger community relationships, increased confidence, or new ways of solving local problems.)

We observed clear impact, especially among counsellors.
Before our work:
- they lacked practical tools
- existing tools were expensive or inaccessible

We provided:
- free tools (through funded projects)
- practical resources they could immediately use

As a result:
- they improved their work with clients
- they actively follow our work
- they expect new tools and initiatives from us

This shows strong adoption and real impact.

SYNERGIA (Portugal)

SECTION A – Context & Startup

A1 Can you describe how your (social) enterprise/company started and what problem it aimed to address?

(For example: what motivated the initiative, how the idea first emerged, and who was involved in the early stages.)

We created Synergia in 2004 in Braga. At that time, the city was very traditional, very connected to religion, and quite closed in terms of mindset. There wasn't really space for urban arts—things like hip-hop, DJs, or alternative music. So there was a clear need to give voice to young people who were involved in those areas. The city wasn't really prepared for that kind of expression, and these forms of art were not seen as something normal or valuable.

That's why we created Synergia—to support and legitimise these types of artistic expression. Over time, the organisation changed a lot, but in the beginning, that was the main gap we were trying to address.

A2 What were the main challenges you faced during the early stage?

(For example: lack of resources, institutional barriers, difficulties in mobilising people, or uncertainty about how to move forward.)

At the beginning, the main challenge was the lack of resources and infrastructure. There were no spaces where these activities could take place.
So we focused a lot on creating those opportunities. For example, we worked with the municipality to secure walls for urban art, and artists were allowed to use them in a more organised way. We also worked on transforming spaces in the city—like tunnels and the bus station—into areas where urban art could be displayed.
In addition, we took an old shopping space with cinemas and transformed it into a venue where artists could present their work, including music, theatre, and visual arts.
So the main issue was really the lack of resources and equipment, and our work focused on solving that.

A3 At that time, what resources and authority did you actually have?

(For example: financial resources, networks, volunteers, partnerships, or any formal or informal influence you could rely on.)

From the beginning, we knew we didn't have enough resources on our own, so we worked through partnerships.
For example, when we created one of our spaces, we didn't have the means to renovate it. So we approached local construction companies and asked for support. They provided materials like flooring, paint, and other essentials, and we were able to build the space through those contributions.
At the same time, in the early stage, we were incubated within another organisation from the social sector. That allowed us to use their resources—things like administration, accounting, and staff support.
Later on, when we had our own spaces, we followed the same logic and made our resources available to other organisations.
This is what we mean by "synergy"—sharing what we have and working collectively rather than individually.

SECTION B – Leadership & Mobilization

B1 How did you convince people to join or support the initiative in the beginning?

(For example: volunteers, community members, partners, organisations, or early supporters.)

In the beginning, everything was based on local volunteering. We went directly into schools and introduced young people to urban arts and music, which helped us attract participants.
At the same time, we started engaging artists, musicians, and trainers. Many of them wanted to collaborate because they believed in the idea of bringing these forms of expression to younger generations.
Our role was mostly to identify what each person was good at and bring them into the project. We didn't impose anything—we acted more as facilitators, bringing people together and creating opportunities for them to contribute.

B2 How did you build trust and legitimacy within the community?

(For example: relationships with local actors, transparency, partnerships, or demonstrating commitment to the mission.)

One important strategy we used was creating a consultative council early on.
We invited representatives from different key institutions in the city—such as the municipality, schools, employment services, universities, and social organisations. They met with us twice a year to help guide the direction of the organisation.
We would ask them what they thought young people needed, and how we could contribute to the development of the city.
This helped us build credibility, because we were not acting alone—we were involving important actors from the community in our decision-making.

B3 How did you communicate your vision during the startup phase?

(For example: meetings, events, storytelling, presentations, or personal conversations that helped others understand the mission.)

We communicated mainly through events and partnerships. At the beginning, when we were focused on urban arts, we worked closely with local radio and created materials that connected well with young people.
When it came to communicating with institutions, it was more difficult. We didn't have internal resources or expertise in communication, so we depended on partnerships.
For example, we worked with universities that had communication programmes, and they helped us develop content.
We also created a YouTube channel at the time, which was quite innovative then, to communicate with younger audiences.
Even today, communication is still a challenge for us because we don't have a structured communication strategy or dedicated internal team.

B4 Can you describe a moment where you had to adapt or rethink your approach, and how you involved others in that process?

(For example: when an initial idea did not work as expected and the team had to change direction or experiment with a new solution.)

A major turning point for us was Erasmus. Through international projects, we were exposed to new ways of thinking and new approaches.
Until then, we were mainly focused on urban arts and music at a local level. But through Erasmus, we realised that we could expand our work to other areas—like education, environment, health, and youth empowerment more broadly.
At the same time, young people themselves started asking for more. They didn't just want spaces to express themselves—they wanted to develop skills and be empowered.
So we shifted from being mainly a cultural organisation to becoming more of a community development organisation.
This also led us to expand to other cities, because we saw that the model could be replicated elsewhere.

B5 In what ways did you mentor, support or develop the capabilities of people involved in the organisation?

(For example: training, guidance, skill development, encouraging participation, or helping people take on new responsibilities.)

We always invested in internal training and capacity-building.
We organised activities focused on skills like entrepreneurship, communication, and public speaking. Since we didn't have financial resources to provide all this ourselves, we worked with partners.
For example, we collaborated with public institutions and asked them to provide trainers. In one case, theatre professionals helped young people improve their communication skills and confidence.

So we identified our needs and then worked with partners to deliver the training.

SECTION C – Commitment & Sustainability

C1 Why do you think people remained committed despite limited incentives?

(For example: shared values, belief in the mission, relationships within the team, or the social impact of the initiative.)

I think a big part of it is the values. We managed to bring together people who really believe in contributing to the community and making a positive impact.
Of course, it was not always easy to keep people involved. Over time, especially after COVID, we noticed that youth engagement changed. Young people were no longer coming to organisations in the same way as before.
So we had to adapt. Instead of expecting them to come to us, we started going into schools. We partnered with a group that manages multiple professional schools and began developing projects directly within those schools.
This allowed us to reach many young people, and from there, some of them became more actively involved in our organisation.

C2 What do you believe was the key leadership factor that allowed the organisation to stabilize?

(For example: a particular decision, leadership behaviour, strategy, or moment that helped the organisation move from an idea to a stable initiative.)

Our leadership model is very collaborative. Even though there are founders, decisions are not imposed—ideas are shared and developed collectively.
At the same time, there is also an element of inspiration and belief. People often associate the organisation with a central figure, but the goal is always to distribute leadership.
We created a structure where each local branch has its own leadership, but all are connected through a cooperative at the national level. This allows for both autonomy and coordination.
So I would say the key factor is a combination of shared leadership, strong belief in the mission, and the ability to inspire others to take responsibility as well.

SECTION D – Social Wealth

D1 What types of education, training or capability-building initiatives has your organisation developed, particularly during the early stage?

(For example: workshops, mentoring programs, skills training, educational activities, or awareness initiatives.)

A lot of our work has focused on non-formal education and capacity-building.
We developed initiatives around:

- entrepreneurship
- communication skills
- youth empowerment

These were often delivered through partnerships, especially when we didn't have internal resources.

D2 In what ways have individuals or the community changed because of these initiatives?

(For example: new skills, improved opportunities, stronger community relationships, increased confidence, or new ways of solving local problems.)

We've seen a big shift in how the community engages with us.
Before, we had to actively reach out to organisations. Now, many organisations approach us because they want to be part of what we're doing.
Schools, local associations, and even municipalities are interested in collaborating with us because they see the results of our work.
We act more as facilitators—we bring different actors together and help them collaborate. Instead of working in isolation, organisations now see value in working together.
This has created a stronger ecosystem where people share resources and jointly address challenges.

INNOVEDU (Portugal)

SECTION A – Context & Startup

A1 Can you describe how your (social) enterprise/company started and what problem it aimed to address?

(For example: what motivated the initiative, how the idea first emerged, and who was involved in the early stages.)

INNOVEDU – Institute of Education and Social Innovation, CRL., was formally established in April 2023, in Braga (Portugal), drawing on the accumulated experience of its founders, Marta Peixoto and Hilário de Sousa, in the fields of education, training, management and social innovation. Both had already worked for different institutions in these areas and concluded that it made sense to create an institutionally autonomous entity, consistent with their vision of education, inclusion, equal opportunities, social responsibility, and ecological and digital transformation.
The creation of INNOVEDU therefore resulted from the combination of two main factors: professional maturity and the desire to build an organisation aligned with their values. Instead of continuing merely to collaborate with third-party entities, they decided to establish a cooperative capable of designing, managing and sustaining its own projects with a social purpose.
From the outset, INNOVEDU sought to respond to the need to promote socially oriented initiatives in the areas of education, citizenship, entrepreneurship and innovation, contributing to equal opportunities, social inclusion, and the social, economic and cultural development of the community. This orientation is reflected in its corporate purpose, institutional mission, 2023-2026 strategic plan, and the first applications and projects developed.

A2 What were the main challenges you faced during the early stage?

(For example: lack of resources, institutional barriers, difficulties in mobilising people, or uncertainty about how to move forward.)

The main challenges during the start-up phase were bureaucratic, legal-institutional and financial. From the outset, important questions arose regarding the most appropriate legal nature for the entity, with the initial reflection oscillating between the creation of a social enterprise and the establishment of a cooperative. At that stage, the support provided by CASES – António Sérgio Cooperative for the Social Economy – was decisive in clarifying the legal framework and consolidating the cooperative solution ultimately adopted.
At the same time, INNOVEDU began its activity without a stable financial base. There was not yet any income-generating activity, but it was necessary to cover incorporation, structuring, communication, work tools and institutional positioning costs. For that reason, from its incorporation to the present, treasury reinforcement by the co-founders has been necessary.

This was compounded by operational challenges typical of a recently established organisation, such as the need to build management instruments, develop the entity's public presence, and deal, for example, with delays in the development of the website. In short, the start-up phase combined bureaucratic demands, financial scarcity, and the need to structure almost everything from scratch.

A3 At that time, what resources and authority did you actually have?

(For example: financial resources, networks, volunteers, partnerships, or any formal or informal influence you could rely on.)

At the initial stage, INNOVEDU had limited financial resources, but it did have relevant human, technical and relational resources. The founders brought solid experience in education, training, institutional management, leadership, proposal writing, project coordination and work with social economy entities. That experience gave them technical authority and professional credibility, even before the organisation had developed its own track record.

The cooperative also counted on the involvement of the other founding members, who contributed expertise in areas such as visual communication, law, engineering and management, as well as on the technical support provided by CASES in framing and consolidating the entity. At the same time, there were already networks of contacts in schools, training centres, associations, municipalities and European contexts, within Erasmus+ projects, which functioned as an important relational asset.

Thus, although the organisation's formal authority was still limited, the professional authority of its promoters rested on their trajectories, their networks and their concrete ability to mobilise knowledge, contacts and qualified work.

SECTION B – Leadership & Mobilization

B1 How did you convince people to join or support the initiative in the beginning?

(For example: volunteers, community members, partners, organisations, or early supporters.)

At the beginning, support came mainly from three core groups. The first consisted of the founding cooperative members, who joined in the creation of the cooperative and helped make the initial structure viable. The second was CASES, whose technical guidance was decisive in clarifying the legal framework and consolidating the establishment of the entity. The third began to take shape through contacts with partners and institutions within the context of applications and projects.

This support did not result from a broad campaign, but rather from the founders' personal and professional credibility, the clarity of the mission, and the coherence of the institutional proposal. INNOVEDU was presented as a serious structure, with clearly defined values and the ambition to intervene concretely in the areas of education, social innovation, citizenship and sustainability.

Over time, that support began to broaden and strengthen through the contacts established in Erasmus+ applications, participation in external initiatives, and the receipt of letters of support and expressions of willingness to collaborate from Braga City Council, Teacher Training Centres of School Associations, and school clusters.

B2 How did you build trust and legitimacy within the community?

(For example: relationships with local actors, transparency, partnerships, or demonstrating commitment to the mission.)

The building of trust and legitimacy was grounded, from an early stage, in concrete signs and not merely in discourse. First, in the legal formalisation of the cooperative and the support provided by CASES, which culminated in the cooperative credential, renewed annually, and in the recognition of the entity's proper functioning. Second, in the registration of the trademark and logo with the INPI at an early stage, as a way of asserting institutional identity and seriousness.

At the same time, INNOVEDU invested heavily in its public presence and strategic coherence – it launched its website in 2024, later renewed it in a second version, invested in social media, structured the 2023-2026 Strategic Plan, and made its mission, vision, values, services and projects visible. This helped demonstrate that it was not merely an intention, but an organisation being built in a consistent manner.
Trust was further reinforced by external signs of recognition, namely letters of support and expressions of willingness to collaborate from public and educational entities. In a recently established organisation, these elements are especially relevant because they function as verifiable indicators of institutional credibility.

B3 How did you communicate your vision during the startup phase?

(For example: meetings, events, storytelling, presentations, or personal conversations that helped others understand the mission.)

During the start-up phase, the vision was communicated mainly through relational and institutional channels, namely through direct contacts, meetings, the presentation of INNOVEDU to dozens of Portuguese and European entities, and discussions developed in the context of preparing applications and projects. Later, this communication gained a more consistent public basis with the launch of the website, activity on social media, and the renewal of the digital presence, including the integration of the Moodle platform (Academia INNOVEDU).
The vision was also communicated in relevant in-person contexts. One concrete example was Marta Peixoto's participation, as an administrator of INNOVEDU, in initiatives promoted by the municipalities of Mafra and Pombal, which invited her to deliver training sessions for teachers from the schools in those municipalities. These moments helped give the organisation and its value proposition external visibility.
The message conveyed was consistent: to build an entity capable of intervening in a qualified way in the areas of education, citizenship, entrepreneurship and innovation, through training, projects, applications, evaluation, consultancy and digital transformation, always with a clear social orientation.

B4 Can you describe a moment where you had to adapt or rethink your approach, and how you involved others in that process?

(For example: when an initial idea did not work as expected and the team had to change direction or experiment with a new solution.)

The clearest moment of adaptation occurred during the incorporation phase itself. The initial reflection on the institutional model oscillated between a social enterprise and a cooperative, which required a rethinking of the organisation's framework until the final solution was reached. This process required conceptual clarification, documentary adjustments, and technical dialogue with CASES; it was a demanding and laborious process.
Later, it was also necessary to adjust priorities and pace in the face of resource constraints, the absence of regular income, delays in the development of the website, and the uncertainty typical of application processes. Rather than waiting for ideal conditions, the strategy became one of moving forward in stages: consolidating the institutional identity, strengthening visibility, presenting the organisation, preparing applications, and creating the minimum conditions for operation.
The adaptation did not occur as a rupture, but as progressive maturation. The cooperative members were involved through formal resolutions, collaborative work in building the entity, and participation in the ongoing initiatives.

B5 In what ways did you mentor, support or develop the capabilities of people involved in the organisation?

(For example: training, guidance, skill development, encouraging participation, or helping people take on new responsibilities.)

Strictly speaking, there is not yet a consolidated formal internal mentoring programme, which is understandable in a cooperative that is still relatively recent. The first employee has been with the organisation for only a few days, so this dimension is still at a very early stage.

Even so, from the outset there was a clear logic of support, guidance and capability development through joint work. This took place in the preparation of applications, the definition of processes, the construction of institutional instruments, participation in projects, and organisational socialisation among founders and cooperative members. Learning has occurred mainly through direct involvement in real tasks.
At the same time, the founders themselves invested in their own capacity-building in areas relevant to the organisation, such as social impact assessment, artificial intelligence and English. In the case of the recently recruited employee, onboarding is being carried out with systematic support, following a demanding recruitment process.

SECTION C – Commitment & Sustainability

C1 Why do you think people remained committed despite limited incentives?

(For example: shared values, belief in the mission, relationships within the team, or the social impact of the initiative.)

People remained committed mainly for reasons of purpose and conviction, rather than because of immediate material incentives. INNOVEDU's mission, the cooperative values it embraced – solidarity, responsibility, social justice, equality, cooperation and trust – and the founders' credibility helped sustain that commitment.
There was also an awareness that this was, inevitably, an investment phase. Those involved knew that the organisation did not yet have consolidated results or strong short-term incentives, but they believed in the institution's potential, the quality of the team, and the project's social usefulness.
The cooperative form encouraged this involvement because it reinforces the sense of belonging and participation. Thus, commitment rested mainly on identification with the mission, trust in the leadership, and the willingness to help build a new entity with meaning.

C2 What do you believe was the key leadership factor that allowed the organisation to stabilize?

(For example: a particular decision, leadership behaviour, strategy, or moment that helped the organisation move from an idea to a stable initiative.)

The main leadership factor that allowed the organisation to stabilise was the combination of persistence, coherence and genuine investment by its promoters. In a context of scarce resources and an initial absence of income, the co-founders sustained the activity, reinforced cash flow when necessary, and continued to build the organisation gradually, without abandoning the mission.
This stabilisation did not result from a single major decision, but from a set of consistent choices, namely: properly formalising the cooperative, structuring the strategic plan and activity plans, asserting the institutional identity, investing in the website and communication, developing applications, consolidating partnerships, and creating minimum conditions for implementation. Leadership was decisive precisely because it ensured direction and continuity at a stage when it would have been easy to give up.
More recently, some milestones have contributed to reinforcing this stability – the continued support of CASES, the approval of SCIFine co-written with INOVA+, the approval of MIND+ prepared by INNOVEDU, the start of both projects, and the recruitment of an employee to support project management. Thus, the decisive factor was less an isolated moment and more a persistent, coherent leadership oriented towards the gradual construction of the organisation.

SECTION D – Social Wealth

D1 What types of education, training or capability-building initiatives has your organisation developed, particularly during the early stage?

(For example: workshops, mentoring programs, skills training, educational activities, or awareness initiatives.)

During the initial phase, training and capability-building initiatives took place at several levels. Internally, there was investment in the capacity-building of the founders and cooperative members themselves in areas such as social impact assessment, management, artificial intelligence, English, and tools to support the organisation's activity. Externally, INNOVEDU began to establish itself through the design of applications, the preparation of projects, the organisation of training provision, and the delivery of training actions.
There are also concrete examples of early interventions involving identifiable groups. One was Marta Peixoto's participation, as an administrator of INNOVEDU, in teacher training actions promoted by the municipalities of Mafra and Pombal. Another particularly relevant example was the EIRA project in the cultural field, whose application was prepared by INNOVEDU and whose implementation was supported by the organisation. This project, developed in Ponte da Barca, was structured in phases of collection, co-design, workshops, installation, artistic residencies, exhibition and performance, involving diverse groups such as farmers, folk groups, bagpipers, the MiNC Youth Theatre Group, the Cultura para Todos Group, and the wider community.
In addition, the drafting and technical management of complex applications itself constituted a relevant form of institutional capacity-building. In 2025, INNOVEDU participated in the co-drafting of the SCIFine application with INOVA+, which was subsequently approved, and fully prepared the MIND+ application, which was also approved and is now in the initial implementation phase. Thus, INNOVEDU's first capacity-building initiatives combined training, internal skills development, work with partners, and the involvement of concrete target groups in educational and cultural contexts.

D2 In what ways have individuals or the community changed because of these initiatives?

(For example: new skills, improved opportunities, stronger community relationships, increased confidence, or new ways of solving local problems.)

There is not yet objective and mature evidence of impact already observed in the strong sense of the term, because INNOVEDU's first core projects are at an early stage of implementation and it would be premature to claim profound changes already demonstrated in individuals or in the community. This caution is important in order to maintain rigour in distinguishing between activity carried out and impact that has actually been proven.
What does already exist are relevant preliminary results, such as the strengthening of organisational capacity, formal recognition through CASES, registration of the trademark with the INPI, the building of a public presence through the website and social media, the creation of partnerships, the receipt of letters of support, the approval of applications, and the launch of new projects. At the relational and institutional level, this translates into increased credibility and trust.
In the case of the EIRA project, it is already possible to state that there was mobilisation of concrete groups and the creation of contexts for cultural and community participation, with collection work, workshops, co-design, residencies, exhibition and performance involving specific groups and the wider community. Even so, the most rigorous formulation, for now, is to speak of involvement, capacity-building and the creation of conditions for impact, rather than impact demonstrated through empirical evaluation.

VERDENOVO (Portugal)

SECTION A – Context & Startup

A1 Can you describe how your (social) enterprise/company started and what problem it aimed to address?

(For example: what motivated the initiative, how the idea first emerged, and who was involved in the early stages.)

The main objectives that motivated the creation of the company were:

- to help combat desertification, abandonment, and the "decline" of Portugal's inland regions;
- to contribute to enhancing cultural and social heritage, especially (but not only) in Portugal's inland regions;
- to help facilitate access to culture and the arts for everyone;
- to contribute to tourism playing a more active role in the economic, social, and environmental sustainability of territories, particularly in inland regions.

A2 What were the main challenges you faced during the early stage?

(For example: lack of resources, institutional barriers, difficulties in mobilising people, or uncertainty about how to move forward.)

As the team is very small (2 people), it has been difficult to secure the resources and skills needed to focus on the company's main objectives;
Difficulty in communication and in attracting clients and partnerships, especially with public entities;
Difficulty in finding, mobilizing, and coordinating work with partners;
Access to financial resources;

A3 At that time, what resources and authority did you actually have?

(For example: financial resources, networks, volunteers, partnerships, or any formal or informal influence you could rely on.)

Some (limited) financial resources to invest in communication and in a pilot project;
Some partners, particularly in the field of communication;

SECTION B – Leadership & Mobilization

B1 How did you convince people to join or support the initiative in the beginning?

(For example: volunteers, community members, partners, organisations, or early supporters.)

We developed several ideas/projects and tried to involve partners in their implementation, demonstrating the potential benefits of those ideas/projects;
Direct contact and scheduling of meetings;

B2 How did you build trust and legitimacy within the community?

(For example: relationships with local actors, transparency, partnerships, or demonstrating commitment to the mission.)

Through dedication, commitment, and a strong focus on implementing projects and activities;
Mobilization of partnerships and previously established contacts;

B3 How did you communicate your vision during the startup phase?

(For example: meetings, events, storytelling, presentations, or personal conversations that helped others understand the mission.)

Meetings;
Events;
Messages (e.g. emails);

B4 Can you describe a moment where you had to adapt or rethink your approach, and how you involved others in that process?

(For example: when an initial idea did not work as expected and the team had to change direction or experiment with a new solution.)

When a key partner (a public entity) in a cultural heritage valorization project withdrew its support, it was difficult to have to abandon the project due to a lack of conditions to continue. Since then, we have tried to ensure that our projects are less dependent on public entities.

B5 In what ways did you mentor, support or develop the capabilities of people involved in the organisation?

(For example: training, guidance, skill development, encouraging participation, or helping people take on new responsibilities.)

The team is very small (2 people), so skills and competencies have been developed in line with each person's assessment and willingness. Both team members regularly take part in information and training activities (seminars, courses, higher education, etc.).

SECTION C – Commitment & Sustainability

C1 Why do you think people remained committed despite limited incentives?

(For example: shared values, belief in the mission, relationships within the team, or the social impact of the initiative.)

Interest in the type of activities and projects developed; Belief in the mission and shared values;

C2 What do you believe was the key leadership factor that allowed the organisation to stabilize?

(For example: a particular decision, leadership behaviour, strategy, or moment that helped the organisation move from an idea to a stable initiative.)

Flexibility and adaptability.

SECTION D – Social Wealth

D1 What types of education, training or capability-building initiatives has your organisation developed, particularly during the early stage?

(For example: workshops, mentoring programs, skills training, educational activities, or awareness initiatives.)

Integrated projects for the valorization of cultural heritage, which include engagement, participation, and capacity-building activities (e.g. seminars, workshops, training sessions);

D2 In what ways have individuals or the community changed because of these initiatives?

(For example: new skills, improved opportunities, stronger community relationships, increased confidence, or new ways of solving local problems.)

New skills; Greater visibility and recognition; More contacts and relationships; New ideas and opportunities;

Author's Statement:

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