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Catalysing Scale

HOW SUPPORT ORGANISATIONS CAN ENABLE SCALING IN THE SOCIAL ECONOMY

REACH FOR CHANGE
ACT GRUPA
pulse Groupe SOS
SCALECHANGER Knowledge partner
LATVIJAS SOCIĀLĀS UZŅĒMĒJDARBĪBAS ASOCIĀCIJA

TABLE OF CONTENT

Introduction: why do social innovations need to scale? 3

Acknowledgements 5

List of Abbreviations 6

Scaling is not easy 7

- Phases in scaling 7
- A diversity of strategies to scale impact 8
- Navigating the risks 10

How can SESOs catalyse change? Understanding SESOs and their role in the entrepreneurial ecosystem 13

- A diverse landscape of SESOs 13
- What SESO offer: services and support models 14
- Key needs of SESOs to support SEs in scaling 15

The scaling journey - Description of the different phases of maturity, scaling strategies and associated challenges. 18

- Stage 1: Diagnosis 19
- Stage 2: Vision / Mission / Ambition alignment 21
- Stage 3: Choosing the right strategy for scaling 23
- Stage 4: Planning and preparation 28
- Stage 5: Mobilising resources and stakeholders 30
- Stage 6: Launch of pilots and lessons learned 32
- Stage 7: Expansion and wide deployment 34

Designing effective support programmes to drive scale. A few guidelines for developing relevant programmes, mobilising the necessary resources, and building strategic alliances 35

- Approach to building a support programme 35
- Core components: a closer look at the main support activities 39
- Structure 48
- Finding the SESO business model 50
- Measuring the impact of programmes 52

Annex 1: Case Studies 56

Annex 2: Related resources and practical tools 85

Annex 3: Self assessment tool for SESO before launching a scaling support programe 86



INTRODUCTION

WHY DO SOCIAL INNOVATIONS NEED TO SCALE UP?

Under the current global economic system, the planet's ability to sustain a growing population is increasingly under pressure. Several critical ecological thresholds have already been exceeded, inequalities are deepening, and the achievement of the Sustainable Development Goals by 2030 is becoming increasingly unlikely. This combination of environmental and social strain reinforces a central reality: **societies need solutions that can create meaningful, lasting, and widespread impact.**

The Social and Solidarity Economy (SSE) offers many of these solutions. Across sectors such as education, health, agriculture, industry, and commerce, **Social Enterprises (SEs)** address urgent social and environmental challenges, create inclusive jobs, influence markets, and attract impact-driven investment. Many already demonstrate effective models—yet their impact remains limited if these innovations do not reach more people, places, or systems.

At this point, a key clarification is needed:

Scaling social innovation does not necessarily mean growing the organisation itself. In common language, scaling is often equated with increasing organisational size. In the SSE, however, scaling refers to the process by which an organisation **maximises its social impact,** whether by strengthening internal capacities, extending its reach, deepening its influence, or catalysing change across its ecosystem. These pathways can take multiple forms, including partnerships, replication, knowledge transfer, advocacy, or improved operational efficiency—and not all require the organisation to grow.

This distinguishes scaling in the SSE from the growth trajectory of profit-oriented enterprises. While commercial businesses scale primarily to increase profits, SEs use economic resources **as a means** to create positive social or environmental outcomes.

Developing a viable financial model remains essential, but only because it secures the long-term sustainability of the mission. When asked why they choose to scale, SE leaders often mention tactical motives such as securing the organisation, diversifying income, or gaining visibility. Yet these are intermediate goals. The **ultimate objective** of scaling is to contribute more effectively to solving a social or environmental issue and, where possible, to drive broader systemic change.

This guide is designed for **Social Economy Support Organisations (SESOs)**—a diverse ecosystem of actors who accompany SEs from the idea stage through consolidation and scaling. The guide provides SESOs with practical tools to structure their support offer, strengthen internal expertise, and maximise their contribution to the scaling journeys of SEs. Its recommendations draw from interviews with 28 European SESOs (11 in-depth interviews and 17 survey responses), feedback from 9 social entrepreneurs who participated in scaling or acceleration programmes, and 10 complementary case studies.

Other stakeholders within the European SSE ecosystem may also benefit from this guide.

- **Public decision-makers** can use it to better understand the needs of SEs and SESOs, design supportive policy environments, allocate resources effectively, and foster strategic partnerships.

- **Financial partners and impact investors** can use the insights to identify promising opportunities and support high-potential SEs and high-quality scaling programmes.

Ultimately, by strengthening their practices, sharing knowledge, and building cohesive support systems, SESOs and their partners can help ensure that social innovations reach the scale of the challenges they seek to address.



OVERVIEW OF THE MAIN SECTIONS

To meet the varied needs of users, the guide is structured in a modular way:

- **Scaling is not easy.** Understand the issues and challenges that social entrepreneurs face when trying to scale up their solutions.
- **How can SESOs catalyse change?** Understand SESOs, their role and how they operate.
- **The scaling journey.** Description of the different phases of maturity, scaling strategies and associated challenges.
- **Support to drive scale.** A few guidelines for developing relevant programmes, mobilising the necessary resources, and building strategic alliances.

ACKNOWLEDGEMENTS

This guide is the result of a truly collaborative effort. We would like to express our heartfelt gratitude to all the individuals and organisations that made it possible.

The Scaling Catalyst consortium, comprising Reach for Change, ACT Grupa, GROUPE SOS Pulse, the Social Entrepreneurship Association of Latvia and ScaleChanger, identified that many SESOs could increase their impact by building on existing best practices for scaling support. All consortium members conducted research with SEs and SESOs. As knowledge partner, ScaleChanger wrote successive versions of the guide and the self-assessment tool for SESOs, drawing on its experience of scaling programmes. All consortium members provided several rounds of proofreading, and their project teams generously shared their time, knowledge, passion and the constant spirit of peer learning reflected on every page of this publication. The guide was then used by consortium members to develop their own capacity to support scaling.

This work was carried out with financial support from the European Union (Erasmus+ programme). We would also like to acknowledge the Swedish Council for Higher Education, acting as the granting authority, for its guidance throughout the process. The views expressed herein are those of the authors only and do not necessarily reflect those of the European Union or the Council.

We would particularly like to thank the social economy support organisations and social enterprises that agreed to be studied, whose insights have brought the guide to life. In alphabetical order, we would like to thank the following organisations: AlphaOmega Foundation, Ashoka, Center for Social Innovation (ZSI), FASE, Impact Shakers, Rethink Ireland, Social Innovation Factory and Up Social, as well as all other structures supported by consortium members and cited as examples.

Finally, we would like to thank every practitioner, mentor, researcher and social entrepreneur who responded to our surveys, took part in interviews or reviewed early drafts. Your candid feedback, critical questions and inspiring examples enabled us to transform a basic document into a practical companion for the entire ecosystem.

Any remaining errors are entirely our own responsibility. We hope the collective wisdom captured here will, in turn, help many more changemakers scale their impact.

LIST OF ABBREVIATIONS

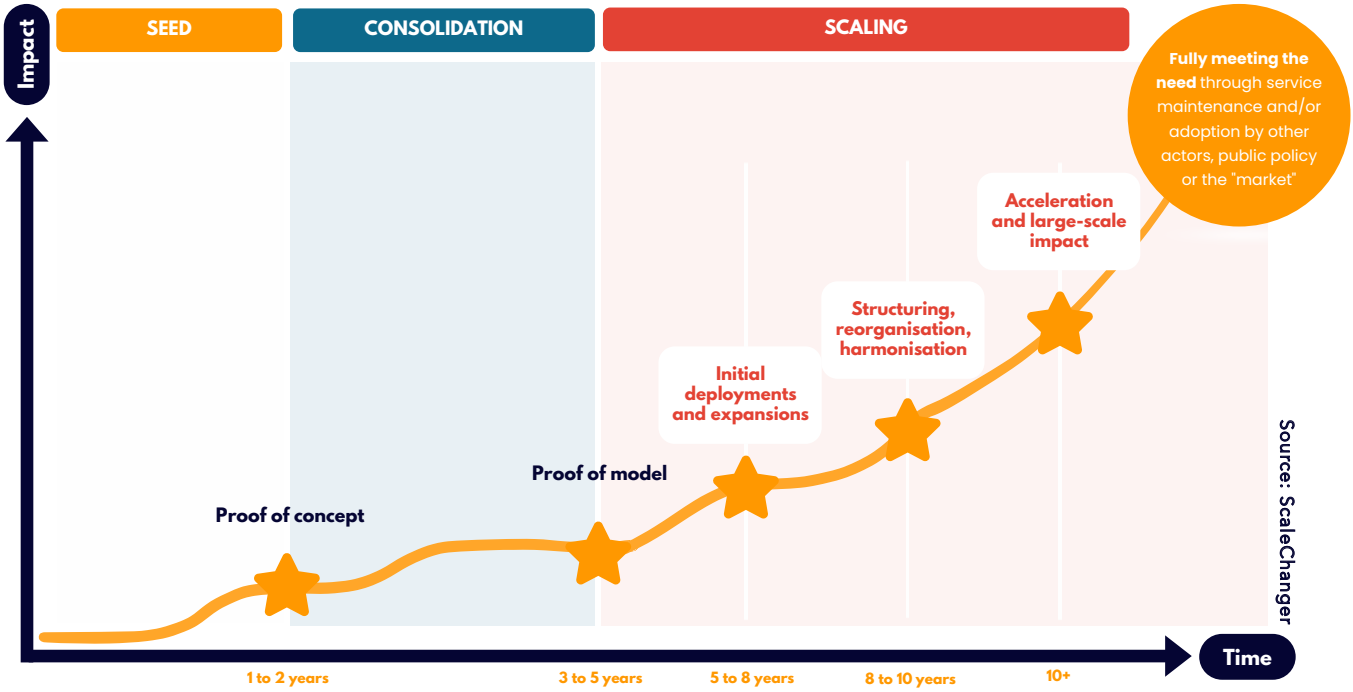
The following list clarifies every abbreviation used in this guide, so you can quickly reference each term as you read.

Abbreviation	Meaning
ACT	ACT Grupa (Croatia), social-enterprise accelerator and advisory organisation
CSR	Corporate Social Responsibility
EU	European Union
HR	Human Resources
KPI	Key Performance Indicator
NPS	Net Promoter Score
NGO	Non-Governmental Organisation
RFC	Reach for Change (international SE support organisation)
SE	Social Enterprise
SEs	Social Enterprises (plural)
SESO	Social Enterprise Support Organisation
SESOs	Social Enterprise Support Organisations (plural)
SME	Small and Medium-sized Enterprise
SROI	Social Return on Investment
SSE	Social and Solidarity Economy
VC	Venture Capital / Venture Capitalist

SCALING IS NOT EASY

Scaling, in the social economy, is the process by which an organisation seeks to maximize its social impact by strengthening its organisation or drawing on its ecosystem. Scaling aims at making a significant dent in the social problem addressed by the organisation. Though each story is different, there are broadly three phases in the development of social innovation: launch, consolidation, and scaling. There are no hard and fast rules about how long each phase lasts, but scaling can only happen if the proof of concept is successful and the model is viable. A concept is proven when the solution demonstrates that it solves the social problem it is designed to address. A viable model delivers this solution sustainably. During those early stages, it is highly relevant to design for scale: even if the proof of concept and the proof of model happen in a relatively small and controlled environment (impacting a small number of beneficiaries or customers, taking place in only one locality, etc…), those phases will provide valuable insights on the next phases. Moreover, scaling is not a mandatory phase; it is a deliberate choice that requires significant mobilisation and represents a transformational change in the life of the organisation (in terms of its product/service value proposition, human resources, organisational structure, roles, etc.). This schematic path is not linear – many social ventures undergo several scaling phases, sometimes with consolidation and restructuring periods in between.

PHASES IN SCALING



Overall, scaling is a journey and may require several attempts. The challenges posed by scaling one's social innovation's impact are of various types. They call for slightly different entrepreneurial qualities and skills to those used in the launch, prototyping or validation/consolidation phases.

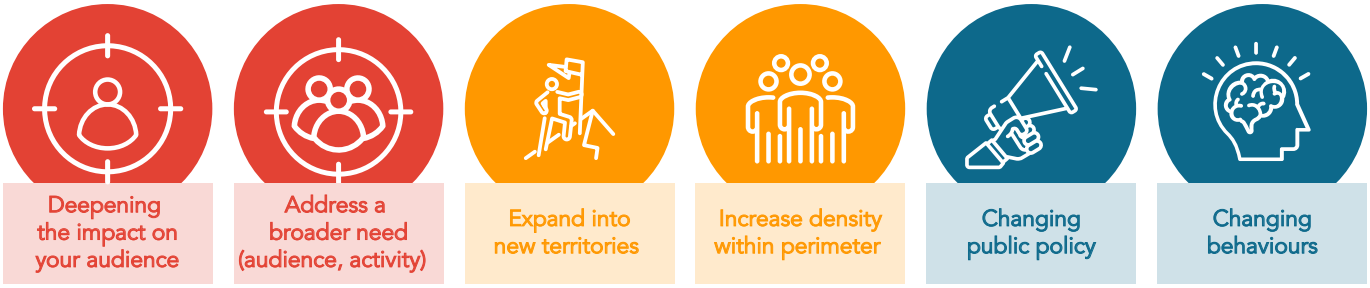
Specific skills required of scaling entrepreneurs include:

- **Leadership:** successfully engaging teams and other stakeholders.
- **Strategy:** formalising the development strategy, testing several hypotheses, and being willing to deviate from initial choices regarding the product/service and the type of customer/user relations in order to develop the strategy.
- **Market access:** knowing partners and having the network to access the market and obtain useful information.
- **Access to finance:** securing finance to fund a change of scale.

Social enterprises at the scaling stage also face many risks – in extreme cases, social enterprises may disappear due to an ill-managed scaling attempt.

A DIVERSITY OF STRATEGIES TO SCALE IMPACT

FOCUS ON DIFFERENT STRATEGIES FOR SCALING



Source: ScaleChanger

A social enterprise can select one or more scaling strategies based on the results of its strategic assessment, its long-term vision and its more medium-term objectives set out in its three- to five-year ambition. Below, we present scaling strategies in three main categories:

QUALITATIVE SCALING: deepening the impact on the current audience, or addressing a broader need

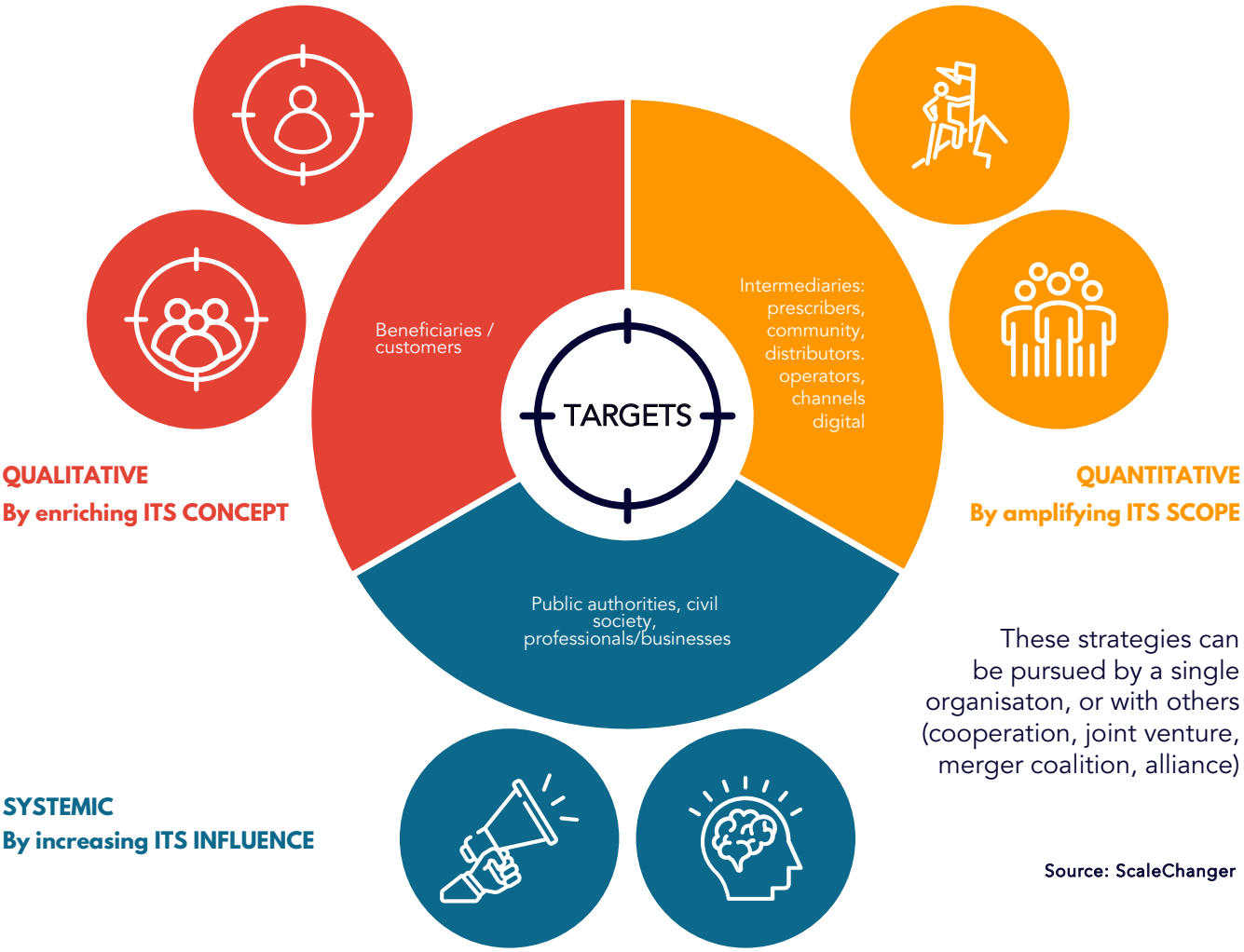
The expansion of an organisation's range of offerings or markets to reach new types of beneficiaries and/or provide a broader range of services to existing ones. The objective is usually to take a more comprehensive and holistic approach in response to needs and challenges. This can be achieved through the organisation's own R&D, or by developing skills and know-how from other organisations, for example through partnerships.

QUANTITATIVE SCALING:
distribute the concept on a larger scale; expand into new territories or increase density within the existing perimeter

Deployment can happen by rolling out its model to reach more beneficiaries within the same territory without expanding into new territories (market penetration or densification) or in new territories (branching off). Penetration or densification involves reaching more beneficiaries within the existing geographical scope by increasing the penetration rate locally, for instance by stepping up outreach efforts or partnerships with prescribers. Branching out or spin offs means rolling out the model to reach more beneficiaries in new localities. This can happen through various strategies, such as fertilisation/dissemination — making the model available to others without formalised connections or networks in a fairly open manner (publication of methodology, training, offering advice, etc.) — or growing your own branches, or through social franchising.

SYSTEM CHANGE

This involves changing laws, practices and mindsets by disseminating the social innovation's approach to other professionals in the sector, developing advocacy activities towards public authorities and/or raising awareness among the general public. Organisations generally (but not always) adopt these systemic change strategies after an initial level of organisational growth that allow them to have secured an evidence-based impact model and acquired a certain credibility. These strategies can lead to systemic change.



These strategies can be pursued by a single organisaton, or with others (cooperation, joint venture, merger coalition, alliance)

Source: ScaleChanger

NAVIGATING THE RISKS

CONTEXT & RELEVANCE RISKS

Success in one context doesn't guarantee success elsewhere. Assessing the risk with impact scaling is not always easy: is our solution relevant to other types of beneficiaries? in other social contexts? in a different territory?

The main challenges are:

- **Changing beneficiary needs or regulatory frameworks.**
- **New competitors** entering the market with greater resources.
- **Market saturation** in certain geographic areas or segments.
- **Fragile partnerships** breaking under pressure.



LEADERSHIP RISKS

Scaling impact might rely on organisational's growth, or on building alliances and partnerships, and evolving positioning within the system. In all cases, management challenges will become more complex.

The main challenges are:

- **Mission drift:** Losing focus on the social purpose.
- **Weakened cohesion:** Misalignment between founders and new recruits.
- **Poor communication:** Internally (teams), and externally (partners, funders).
- **Unclear or contested decision-making.**

EXAMPLE

Keenat (France)
www.keenat.com

Keenat offers innovative solutions to raise awareness, collect and recycle waste. They have developed many solutions for cigarette butt collection, recycling and recovery of single-use PPE, as well as collection and energy recovery from chewing gum.

« We transitioned from a close-knit, family-like team to one with middle managers. That shift was emotionally difficult. It changed how we related to each other. Some employees saw the fundraising as an opportunity to negotiate a pay rise. This dynamic was very hard to manage. »

ORGANISATIONAL RISKS

Rapid growth or managing a change in positioning in their eco-system can put existing structures under pressure.

The main challenges are:

- **Governance gaps:** Boards or management teams that are not adapted to the new scale.
- **Weak systems:** Processes and digital tools are no longer fit for purpose.
- **Recruitment errors:** Hiring too quickly or without clearly defined roles.
- **Skills gaps:** Need for expertise in digital systems, impact measurement and financial modelling. In general, new hired profiles will need to be more specialised, and less polyvalent than in the beginning phases.

EXAMPLE

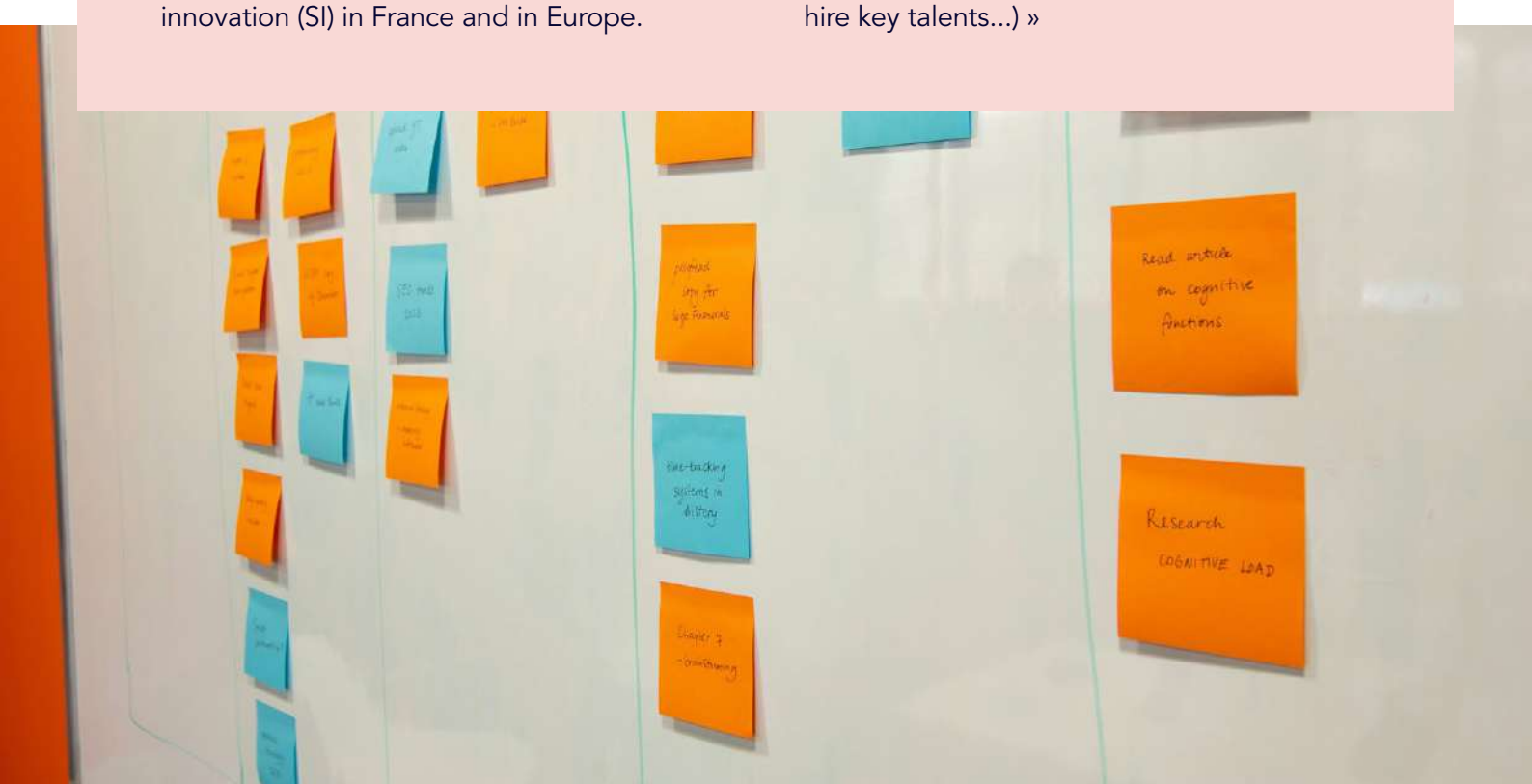
Keenat (France)
www.keenat.com

« We underestimated the complexity of integrating new software. We should have hired a dedicated person, but we delayed. We also hesitated to invest in a sales manager. That fear of spending cost us valuable time — we could have reached profitability a year earlier. »

Avise (France)
www.avise.org

Avise is a public interest association that supports the development of the social and solidarity economy (SSE) and social innovation (SI) in France and in Europe.

« In terms of skills, we aim to help social entrepreneurs move from an individual/ entrepreneur/founder mindset to CEO of an organization, as they scale (setting up processes, structure, taking a step back from daily operations, focus on strategy, delegate, hire key talents...) »



ECONOMICAL RISKS

Scaling requires upfront investment before any return (both impact and financial) materialises.

The main challenges are:

- **Cash flow strain:** This is especially the case during the launch of new sites or services.
- **Cross-functional costs:** Support functions (finance, HR and impact) become more demanding.
- **Investor misalignment:** Difficulty in finding investors who are aligned with the dual social and financial mission.
- **Lack of scalability:** Some business models are not easily replicable.

EXAMPLE

Mouvement Impact France (France)
www.impactfrance.eco

Mouvement Impact France is a network of 30,000 French business leaders who place ecological and social impact at the heart of their companies.

« A big challenge is shifting the mindset that social impact and economic performance are mutually exclusive. We launched a campaign on 'avoided costs' to demonstrate how impact businesses generate value for society. »



LEGAL RISKS

As social enterprises expand geographically or operationally,or as they modify their role in the eco-system, new regulatory frameworks apply.

The main challenges are:

- **Unfamiliar legal requirements:** This is especially the case in new countries or sectors, or with evolving business models.
- **Underinsured activities:** New risks are not properly covered.
- **Intellectual property and licensing:** Not always anticipated. For instance, when choosing to share widely their expertise or know-how, organisations need to decide whether they become an "open source" resource centre or licence project holders. This choice has legal and economic consequences.

HOW CAN SESOs CATALYSE CHANGE?

UNDERSTANDING SESOs AND THEIR ROLE IN THE ENTREPRENEURIAL ECOSYSTEM

A DIVERSE LANDSCAPE OF SESOs

The Social Economy Support Organisations (SESOs) support and strengthen social enterprises (SEs) throughout their life cycle. These organisations act as catalysts, enabling SEs to maximise their social and environmental impact. 'SESO' is a generic term for all such structures, which vary according to their mission, funding model, organisation and the services they offer. Some SESOs offer premises such as business incubators, co-working spaces and company hotels, while others operate exclusively remotely, for example distance learning centres. Some SESOs specialise in a particular sector, such as technology or agri-food, while others are generalists. Some focus on a single stage of development, while others target all stages. Ideators work with project initiators before a company or organisation is set up; incubators work with start-ups/ nascent organisations and those in the early development stage; fablabs focus on the emergence of technological innovations; and accelerators work with established SEs looking to accelerate their impact. Finally, some SESOs offer multi-component programmes to cohorts of entrepreneurs, while others focus more on individual support.

EXAMPLE

Impact Hub (France)
www.impacthub.net

Impact Hub is a global network of incubators offering co-working spaces and incubation programmes for social entrepreneurs. It helps early-stage social entrepreneurs (SEs) refine their ideas, develop a viable business model and connect with their first financial partners. With a presence in several countries, Impact Hub illustrates the international reach and generalist model of some SESOs.

Sociale Innovatie Fabriek
(Belgium)
www.socialeinnovatiefabriek.be

Sociale Innovatie Fabriek (The Social Innovation Factory) supports social innovators at all stages of development, from pre-start to scaling, with a variety of programmes, such as Scalers Club, Corporate Social Intrapreneurship and Scaling International. Its flexible, ecosystem-based approach is representative of SESOs that combine a broad sectoral focus with tailored support.

SESOs also differ according to their source of funding and governance.

- **Public:** State funding, often focused on projects with a strong local social impact (e.g. regional incubators in Spain).
- **Private:** Supported by companies, associations, and foundations.
- **Hybrid:** A combination of public and private funding (e.g. Ashoka Europe).

WHAT SESO OFFER: SERVICES AND SUPPORT MODELS

The services offered by SESOs most often fall into one of the following categories:

1. Premises: offices, meeting rooms, laboratories, equipment, etc.

2. Facilitating access to finance:

- Identifying funding opportunities (grants, impact investors, etc.).
- Training in creating solid pitch decks and presenting them to funders.
- Investing in enterprises.

3. Capacity building:

- Setting up general or targeted training courses (e.g. project management, leadership, impact measurement).
- Mentoring and support: advice and individual or group follow-up

4. Creating and running networks:

- Putting entrepreneurs in touch with strategic partners (public bodies, private companies and other social enterprises).

EXAMPLE

The Social Business Trust (UK)
www.socialbusinesstrust.org

The Social Business Trust can co-invest in social enterprises and unlock additional funding opportunities through its network of partner businesses.

ScaleChanger
(France)
www.scalechanger.org

ScaleChanger is a French-based organisation that offers individual and group support to help social enterprise (SE) leaders and managers develop their skills in scaling and provides step-by-step guidance.

Spring Impact (UK)
www.springimpact.org

Spring Impact is a UK-based NGO specialising in scaling strategies. It provides strategic guidance to social enterprises through remote and in-person advisory services. They specialise in helping SEs structure their growth to achieve wider social impact.

Techfugees (Europe)
www.techfugees.com

Techfugees connects entrepreneurs working on tech solutions for refugees with each other, as well as with tech entrepreneurs.

KEY NEEDS OF SESOs TO SUPPORT SEs IN SCALING

EVASIVE ECONOMIC BALANCE

SEs do not have the resources to fund support when they need to focus all their efforts on scaling impact, organisational growth and/or evolving roles in the ecosystem. Consequently, the support effort for SEs is funded by third parties, and the direct beneficiaries of the support (SEs) are often not those paying for it. SESOs often have to seek third-party funding. The SESO business model can be difficult to stabilise.

According to an initial survey conducted by the Scaling Catalyst consortium, 70% of responding European SESOs indicated that insufficient financial resources limited their ability to provide effective support to SEs.

Rethink Ireland (Ireland)
www.rethinkireland.ie

Rethink Ireland is a venture philanthropy fund that combines dormant public funds with private donations, asking mature SEs to co-finance part of their grant. While the hybrid model helps to secure multi-year resources, it requires constant fundraising and robust impact measurement.

SPECIFIC AND SPECIALISED SKILLS

In order to support SE scaling, different human resources are required to those needed for incubation. The strategic diagnostic and business modelling skills required for the ideation and proof-of-concept phases are still necessary. However, these need to be complemented by an understanding of various scaling strategies.

In the Scalomètre (link to be inserted), a study of 50 SE who scaled recently published in January 2026, entrepreneurs pointed the skills they expect in support organisations:

- Strategic skills, to help them take a step back, design and validate a strategic vision;
- Leadership skills to help them change posture, from founder to CEO, manage stress and structure the governance of the organisation
- Expert technical skills, in impact measurement, HR & legal, finance and fundraising, as well a digital & IT (IT strategy, tools selection)

EXAMPLE

SE Forum (Sweden)
www.se-forum.se

In Sweden, the older generation of social enterprises largely originates from civil society and therefore values 'business upskilling' (financial modelling and market strategy). In contrast, younger founders, who are already business-savvy, request sophisticated impact-measurement coaching. SE Forum has adapted its curriculum accordingly, **showing how tailoring support to generational skill gaps** can accelerate scaling.

SE Forum has built a network of mentors who have managed a fast-growing company and are familiar with design thinking and lean innovation approaches. Ideally, these mentors have scaled their own company and are inspiring.

EXAMPLE

Sociale Innovatie Fabriek
(Belgium)
www.socialeinnovatiefabriek.be

'We can't — and don't need to — be experts on everything, but we do need to know where the experts are.' SIF continually maps and cultivates a community of external 'enablers' (legal, digital, HR and impact). This model enables any supported social enterprise to **access the right specialist exactly when needed, without SIF having to carry every competence in-house.**

Finally, preparing to raise funds at intermediate levels requires more specialised skills, such as preparing more developed pitch decks (often differentiated according to business sector), conducting more complex financial analyses, and creating business models adapted to a variety of contexts / value propositions.



SCALING SUPPORT REQUIRES MORE TAILORED AND LESS STANDARDIZED APPROACHES

One of the challenges for SEs when it comes to scaling is that more bespoke approaches and strategies are required. There are many different scaling-up strategies, largely depending on the type of product or service offered, the sector of activity and the SE's vision and ambitions. This makes it more difficult to standardise tools and means that scaling support for scaling SEs often requires more 'tailoring'.

Many of the tools and canvasses used in incubation are still useful at this stage, especially:

- Lean innovation
- Design thinking
- Advanced business modelling (for several legal entities and different types of relationships between them)

However, given the variety of situations and paths, few standardised tools are useful.

SOURCING SCALING SOCIAL ENTERPRISES

Identifying high-potential social enterprises is particularly challenging in certain ecosystems, such as in isolated or less-connected regions. Some areas have very few, if any, social enterprises with immediate high growth potential.

Partnerships with universities, local associations and social economy stakeholders may help to identify scaling SEs. When there are not enough social enterprises in the scaling phase, it might be more relevant to focus on those in the consolidation phase — that is, those that have proven their concept and are consolidating part of their business model.

It is key to highlight that incorporating scaling in the design phase - from the incubation stage - through to the acceleration stage is critical, so that the processes are thought with the social innovation at scale from the outset. Indeed, SEs' initial concepts are not always easy to scale, either because they rely on very specific local circumstances that are difficult to replicate or because the social problems they address are not perceived as priorities in other sectors. Including some sessions on scaling early in an SE's life might help them to design for scale from an early stage by maintaining lean testing and development methodologies. In some cases, business model innovation and digitalisation may allow for faster consolidation before scaling.



CONCLUSION OF PART 2: PREPARING FOR WHAT COMES NEXT

Understanding SESOs and the challenges they face is an essential step in creating a relevant guide. This section has highlighted the diversity of SESOs and their crucial roles, as well as their critical needs in order to maximise the impact of social innovation. The next section will explore the key stages of scaling and detail effective strategies that SESOs can implement at each stage of this complex process.

THE SCALING JOURNEY

DESCRIPTION OF THE DIFFERENT PHASES OF MATURITY, SCALING STRATEGIES AND ASSOCIATED CHALLENGES

INTRODUCTION:
A STRUCTURED METHODOLOGY TO MAXIMISE IMPACT

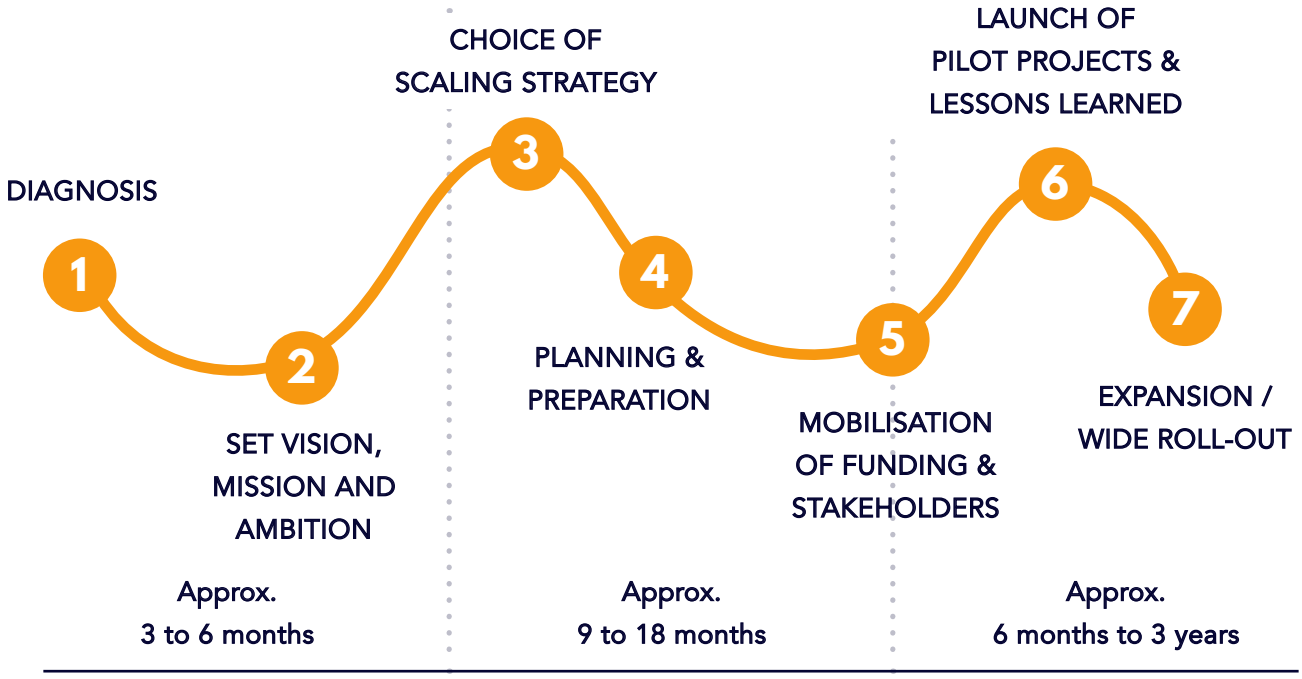
Scaling is a strategic approach that enables the multiplication of social impact while ensuring the sustainability of the social enterprise. Based on a series of methodological steps, it enables SEs to structure the pathway to grow their impact, mobilise the necessary resources, and adapt their model to new contexts.

SESOs (Social Economy Support Organisations) play a fundamental role in this process, supporting SEs as they navigate these stages and overcome complex obstacles to ensure successful scaling.

At every stage, SESOs act as catalysts for change, combining expertise, appropriate methodologies and the ability to mobilise key resources. Their support helps social enterprises to maximise their impact while managing the risks associated with growth.

Please note that the scope and intensity of support that a SESO can provide depends on its current programmes, advisory capacity and available budget. Not all SESOs offer the full range of services described in this guide.

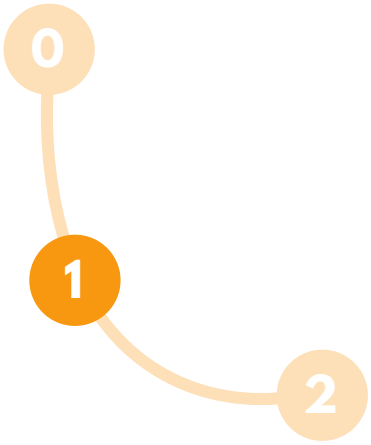
THE STEPS



Source: ScaleChanger

STAGE 1

DIAGNOSIS



OBJECTIVE

As part of a scaling approach, evaluate the social enterprise's current situation to identify its strengths, weaknesses, opportunities and threats, and above all, assess whether now is the right time to scale.

KEY ACTIONS

1. Review theory of change, current impact of the solution.

Why? To clarify and make sure the team is aligned, if required, on which impact needs scaling, and the scale of the social problem to be addressed.

How? Review current activities and beneficiaries, value proposition to the beneficiaries, and available impact measurement data.

2. Analysis of the organisation's strengths and weaknesses.

Why? It provides a better understanding of the organisation's current capabilities, such as its skills, governance and finances, and identifies areas that need strengthening before scaling is considered.

How? Carry out an audit with an analysis (strengths, weaknesses) and assess organisational maturity.

3. Assessing the external environment.

Why? Understanding the specific needs of beneficiaries, market dynamics, along with regulatory and partnership opportunities is essential for identifying levers for scaling.

How? Carry out field surveys, meet local stakeholders and analyse the legal framework in the new target territories.

4. Identify the social impact objectives to be achieved.

Why? Clearly defining the ambitions ensures that scaling remains aligned with the organisation’s social mission. Identifying the end vision, what the success of the social innovation at scale looks like allows to build a coherent path to achieve it.

How? Set measurable and realistic impact indicators, such as the number of beneficiaries impacted by the solution compared to the estimated need, or the targeted societal changes.

WHEN IS IT RELEVANT TO GET STARTED?

Internal analysis

- Proof of impact
- Demonstration of product/service impact
- Sustainability of the business model
- Formalisation and modelling of the concept
- Model replicability
- Organisation's maturity: quality of team and human resources, communications, etc...
- Ability of managers to drive development

Strategic vision

- Clarity and formalisation of the mission, vision, values and ambition
- Intentions and positioning of governance
- Expectations of existing and potential stakeholders

External analysis

- Forward-looking analysis of the sector of activity
- Changing customer or beneficiaries needs
- Opportunities - presence of the needs in other territories
- Competition analysis
- Evolution of partners and resources

Source: ScaleChanger

ROLE OF THE SESOs: CARRYING OUT A FULL DIAGNOSTIC TO ASSESS MATURITY.

Why? Diagnosis enables us to determine whether the social innovation is ready to expand, and to identify any necessary adjustments to avoid the risk of failure. It is essential to understand not only the business model and the mechanisms for generating impact, but also the key players (beneficiaries, partners, alternative solutions, other actors in the social impact value chain…) in order to anticipate needs and opportunities when the solution is at scale.

SESOs provide expertise in impact evaluation, organisation and strategic analysis. They provide a critical external view that can allow the organisation to take a step back, by playing a neutral role, which is essential for identifying weaknesses or opportunities that the organisation may overlook.

How?

• Propose structured methodologies, such as self-assessment / diagnostic tools or collaborative workshops.

• Train teams in the use of assessment tools (e.g. the SWOT model, system mapping and analysis, stakeholder mapping).

• Bring in external experts or consultants to conduct in depth analyses.

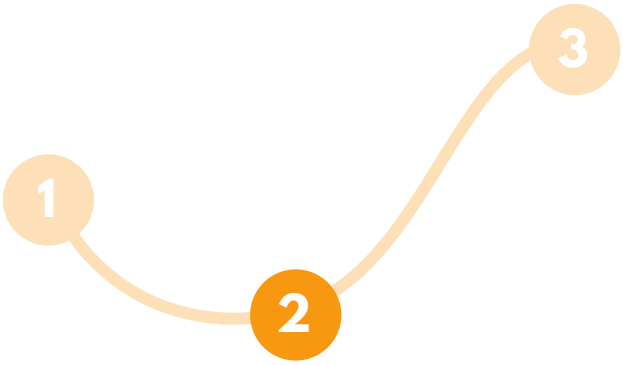
TOOL EXAMPLE

The **Scale Me Up** tool, developed by ScaleChanger and the French Development Agency (AFD), enables social enterprises to carry out a 360° scan of all areas of their organisation and identify its overall level of maturity along with strengths and areas for improvement.

www.scalemeup.io

STAGE 2

VISION / MISSION / AMBITION ALIGNMENT



OBJECTIVE

Make sure that the ambition to scale is consistent with the organisation's social mission and strategic vision.

KEY ACTIONS

1. Define a clear, coherent and shared vision.

Why? Any vision at scale and scaling journey must be consistent with the organisation's Theory of Change. Hence a first step of this stage is to review the Theory of Change, and insure that it is clear: how exactly is the desired impact generated? Is scaling consistent with the vision and mission of the organisation, or would the mission need to change? What is the innovation's / organisation's end game, and what would the world look like if their vision was realised? If the addressed social/ environmental problems were to be solved entirely, who would provide the services or products, and who would pay for them?

Strong alignment between the organisation's vision (the world it is trying to build), mission (its unique way of contributing to solve the problems hindering it) and ambitions enables effective mobilisation, both internally and externally. A well-defined vision of the solution at scale acts as a compass, guiding all strategic decisions and uniting internal and external stakeholders.

How? Organise participatory workshops with the internal teams and the Board of Directors to review the existing theory of change, or make it explicit if it is not yet, and formulate an ambitious yet realistic vision for achieving impact at scale: What is the vision of the endgame, or desired end situation? what would the world look like if our vision was to be realised? What would our role be then?

EXAMPLE

Järvaskolan (Sweden)
www.jarvaskolan.se

From day one, Järvaskolan, a secondary school in a disadvantaged district of Stockholm, has framed its Theory of Change around transforming the public school system, rather than merely opening a chain of private campuses. The founder's "endgame" is mainstream adoption of the pedagogical model. Each new site is therefore designed as a proof point and developed in partnership with the municipal authorities. Documenting this systemic vision from the outset ensures that every scaling decision is aligned with mission fidelity rather than brand expansion.

2. Translate the vision into concrete objectives.

Why? Having measurable objectives makes it easier to monitor progress and adapt the strategy accordingly.

How? Formulate realistic and measurable ambitions for impact.

ROLE OF THE SESOs

The SESOs provide an external perspective, enabling to challenge the entrepreneur's logic and coherence. They facilitate mediation between divergent stakeholders' visions, ensuring strategic cohesion. An outside perspective helps to put scaling opportunities in perspective against the social mission, and to guarantee alignment between ambitions, vision and mission.

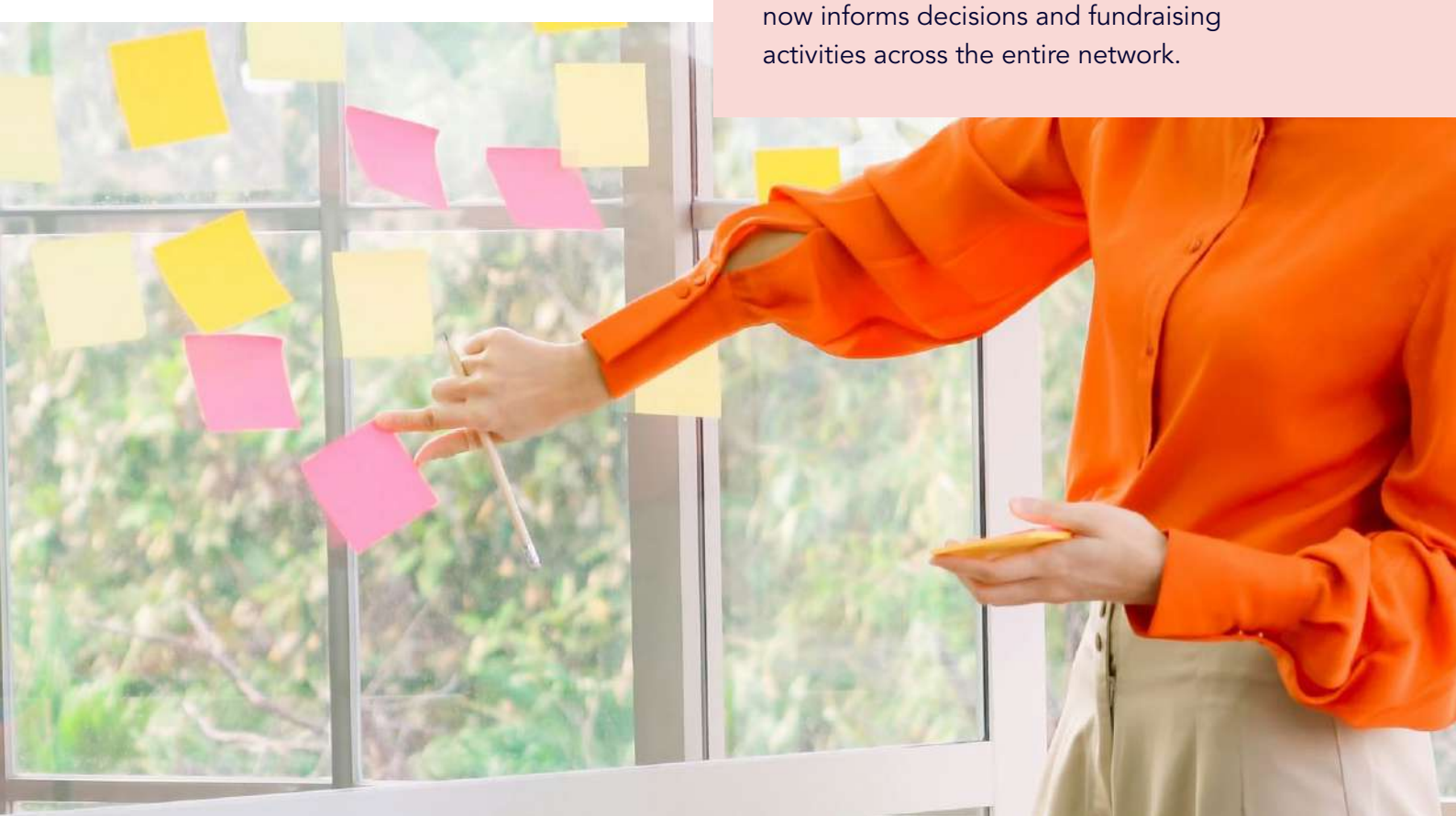
How?

- Organise strategic seminars to align decision-makers.
- Provide strategic framing models to guide the development of the vision.
- Offer inspiring examples of other social innovations that have successfully scaled.

EXAMPLE

60 000 Rebonds (France)
www.60000rebonds.com

60 000 Rebonds is a volunteer-driven network that helps entrepreneurs bounce back after a business failure. Prior to scaling nationally, the organisation worked with ScaleChanger to formulate a three-year ambition. Through a series of regional and national workshops, local chapters and the board mapped their shared 'North Star' (the number of entrepreneurs to be sustainably reintegrated into economic life, create a national index of perceptions of failure, offer training on this subject in incubators and higher education, and provide compensation in the event of business failure) and clarified each branch's contribution. This collectively written vision now informs decisions and fundraising activities across the entire network.



STAGE 3

CHOOSING THE RIGHT STRATEGY FOR SCALING



OBJECTIVE

Identify the most appropriate scaling strategy to maximise social impact.

KEY ACTIONS

1. Analyse scaling options.

Why? Each strategy — whether qualitative, quantitative or system change — has its own specific advantages and constraints. Making an informed choice ensures the optimal allocation of resources.

How? Analyse the social needs not covered by the current solution, other existing solutions and the potential for deployment. Analyse how each scaling pathway would contribute to reaching the success vision. Carry out a cost-benefit analysis of each option, taking the social need, the organisational and territorial context into account.

Académie Younus (France)
www.academie-younus.com

ACADÉMIE YOUNUS

Founded by a former professional basketball player, the academy provides sport training and after school support to youth in disadvantaged neighbourhoods. In order to contribute to a world where every young person can become an autonomous and socially committed adult, Younus Academy explored three scaling scenarios with ScaleChanger: centralised branching, social franchising and dissemination of their methodology through a network of independent organisations. After formalising the most important elements to them (ensuring quality of delivery) and conducting a cost-benefit analysis and culture-fit scoring, the team selected a centralised model that matched their resources while safeguarding pedagogical quality, even if it meant achieving scale at a slower pace.

2. Prioritise strategies according to objectives and available resources.

Why? Taking a realistic, targeted approach maximises the chances of success.

How? Use a prioritisation matrix to evaluate the impact, feasibility and sustainability of each option.



ROLE OF THE SESOs

Why? Thanks to their experience with other social enterprises, SESOs and/or their experts often have an overview of the different strategies, enabling them to guide organisations in their choice and assess the costs and duration of each stage more accurately.

How?

- Provide a comparative analysis of the different strategies.
- Share feedback from other SEs that have adopted these approaches.
- Support SEs in keeping impact at the heart of their strategic choices (steering by impact and scaling guided by impact rather than organisational growth alone).
- Provide experts or coaches to support strategic choices.

EXAMPLE

Bands & Beads (Latvia)
www.intelektacentrs.lv

The mission of B&B is to make cognitive development and mental self-regulation accessible to all. They offer various mindfulness training programmes, as well as training in attention and concentration, physical conditioning, literacy and sensory integration.

Facing its first territorial deployment, the social enterprise established a mini "think tank" and invited founders from mainstream sectors who had previously grown their businesses through company-owned outlets and social franchising. Their real-life stories helped Bands & Beads to compare the two approaches and design a phased roll-out plan.

These strategies can be implemented by social enterprises either independently or collectively alongside other structures, either through coalitions, joint ventures or mergers. While these multi-party strategies are more difficult and time-consuming to implement, they often yield better results ('Alone we go faster; together, we go further'). This is particularly true when several organisations join forces to co-develop a joint offering or when a coalition is formed to promote a common cause.



Siel Bleu (France)
www.sielbleu.org

Siel Bleu is a non-profit organisation that gives everyone, regardless of their abilities, where they live or their financial situation, the opportunity to improve their health and well-being throughout their lives. Initially, Siel Bleu mainly offered Adapted Physical Activities (APAs) for sick or vulnerable people.

Then, they **diversified horizontally** by developing activities for companies (targeting business employees). This involved a diversification of their audience (from sick or frail people to business employees) as well as a diversification of sales channels (from B2C to B2B). To achieve this, Siel Bleu created a subsidiary company, 'Siel Bleu at Work', in which the Siel Bleu association is the sole shareholder. This strengthened the overall economic model by reaching a new, more affluent audience, namely businesses interested in the health and wellbeing of their employees. 'Siel Bleu at Work' offers wellbeing and APA sessions at workplaces, as well as APA training to employees.

Then, they **diversified horizontally once again** with the launch of APA at Home, entering the field of paramedical activities (providing support to help maintain autonomy). To achieve this, they established an association accredited for home services, which enables them to benefit from tax advantages and remain financially accessible to beneficiaries by capturing more effectively available public funding and aid.

Then, they **diversified vertically** by creating a company to produce adapted equipment, thus moving up the value chain.

The Siel Bleu Group has also developed an institute to promote the recognition of APA and study its effects.

FOCUS ON THE "DEPLOYMENT" STRATEGY – DENSIFICATION / MARKET PENETRATION

The penetration strategy involves rolling out a model — or part of a model — to reach more beneficiaries with the same solution. This means that the social enterprise does not need to expand into new territory. Densification is characterised by increased penetration rates and often enables economies of scale to be achieved within a given territory.

Below are some of the challenges that social enterprises may face when choosing to scale through densification or deeper penetration:

• Strengthening their organisation (e.g. by creating and implementing formal processes) and tools (particularly digital tools) to facilitate growth and achieve economies of scale.

• Investing in strengthening processes for acquiring new beneficiaries (or customers): to increase its penetration rate, the social enterprise will need to target beneficiaries (or customers) who are not reached by its current communication and distribution channels.

• Developing a communication strategy (e.g. a broader referral strategy with new operational partners) will help to reach new beneficiary audiences and potentially raise awareness among new audiences.

FOCUS ON DEPLOYMENT STRATEGIES – "SPIN-OFFS OR BRANCHING OUT" STRATEGIES

Spin-offs are a strategy used by social enterprises to scale their operations and roll out their model (or part of it) to reach more beneficiaries in new areas. There are four main branching out scaling strategies, or 'scaling up models':

• Scaling up through fertilisation: making expertise available to independent actors (organisations or individuals) without any formal links being established between the organisation initiating the fertilisation action and the actors acquiring this new expertise. The transfer of expertise can be carried out openly (e.g. by making expertise freely available on a website) or through contracts that provide a framework and support for the transfer of expertise (e.g. a contract that provides a legal framework for the transfer of intellectual property and trains the organisation so that it can sustainably appropriate the new expertise).

• Flexible spin-offs: The organisation behind the flexible spin-off establishes a network of independent legal entities that share a charter, including the same vision, mission, values and principles of action. Often, they also share the same brand. Members of the network carry out their activities in accordance with this charter in their respective territories.

• Social franchise spin-offs: social franchising involves developing a network of independent legal entities that share a charter, brand and common activities and operating methods, which are often highly regulated and defined in an operating manual. There is also a strong contractual link in the form of a partnership or franchise agreement between the central structure (franchisor) and each member entity within the network (franchisees). Members of the social franchise network then develop their activities within their respective territories in accordance with the rules and operating methods set out in the operating manual and partnership agreement.

• Centralised spin-off: The organisation behind the centralised spin-off establishes a branch or team in each new localities and controls these, ensuring they apply the group's strategy.

This distinction between the four main replication models is provided to illustrate the differences between them. These broad strategies provide a useful framework for social enterprises structuring their replication approach who wish to choose between the different models.

The models are not mutually exclusive, and it is not uncommon for a social enterprise to pursue two replication strategies simultaneously. For instance, some organisations may decide to replicate through social franchising in certain areas (e.g. rural areas) and in a centralised approach in others (e.g. urban areas). Organisations may also adopt different strategies for different activities (e.g. distance learning for activity A and creating branches in new areas for activity B).

Solinum | www.solinum.org

Solinum is a laboratory that develops innovative solutions to combat poverty. They provide quality data to all stakeholders about aid against poverty. The Soliguide is an online solidarity map that lists all the places and services available to people in difficulty and the solidarity organisations that support them. To grow their impact at a national scale, Solinum relies on a mixed strategies of opening their own branches and working in partnership with local associations.

TOOL EXAMPLE Example of a tool to assess whether the SE is ready to "spin off" or branch out

1. The social enterprise has a defined and shared charter / theory of change, defined the vision of its social innovation at scale.
2. The social and/or environmental impact is demonstrated, assessed and valued.
3. The social innovation's business model is viable and efficient.
4. The organisation of the social enterprise is optimised and its management professionalised.
5. The social enterprise's processes, activities and know-how are documented, secured (intellectual property) and easily transferable.
6. The needs to which the social innovation responds exist in other territories and the existing solutions in these territories do not provide satisfactory responses to these needs.
7. The social innovation (solution) developed by the social enterprise can be replicated elsewhere. Its impact with beneficiaries/customers is not dependent on local conditions only.
8. The social enterprise's governance and teams support the scaling ambition.
9. The social enterprise's external stakeholders (e.g. funders, strategic partners) support the scaling of the social innovation and are ready to engage to help it grow its impact / change the system.
10. The social enterprise is capable of mobilising suitable human resources in order to plan and implement the scaling process.

FOCUS ON SYSTEM CHANGE STRATEGIES "CHANGING THE LAW, PRACTICES AND ATTITUDES"

As mentioned above, a social enterprise cannot alone respond to the scale of the social and/or environmental needs at the heart of its mission. In order to develop innovative solutions and increase its impact, it usually works in collaboration with organisations and institutions within its ecosystem. Once it has demonstrated its social impact and formalised a robust model, a social enterprise can address more directly its ambition to 'change the system' by promoting the rollout of its social innovation to as many people as possible through various means (e.g. changing attitudes and behaviours, changing the law and public policy, and developing new ways to finance the rollout of its social innovation).

Thus, a social enterprise may seek to drive large-scale systemic change by disseminating its approaches to other professionals in its sector, developing advocacy activities towards public authorities or carrying out awareness-raising activities among the general public.

Social enterprises generally tackle these systemic change strategies after an initial level of organisational scaling (e.g. establishing a presence in several territories and reaching a size that gives them legitimacy to carry out advocacy activities with national stakeholders), or join forces with other (sometimes more mature) organisations to implement these complex strategies.

Beyond the organisation's direct action with its beneficiaries, these scaling strategies seek to address the systemic causes of problems and change the overall framework and established practices to bring about lasting improvements to beneficiaries' situations. Depending on the issue being addressed, these strategies can result in changes to the roles, resources and rules within the system, as well as the mental models (ways of seeing and interpreting the world) that led to the current system.

STAGE 4

PLANNING AND PREPARATION



OBJECTIVE

Build an operational roadmap and mobilise the necessary resources. Identify the hypotheses to be tested in order to implement an iterative approach, enabling rapid learning and the confirmation or assertion of strategic choices at lower risk.

KEY ACTIONS

1. Co-constructing the scaling strategy.

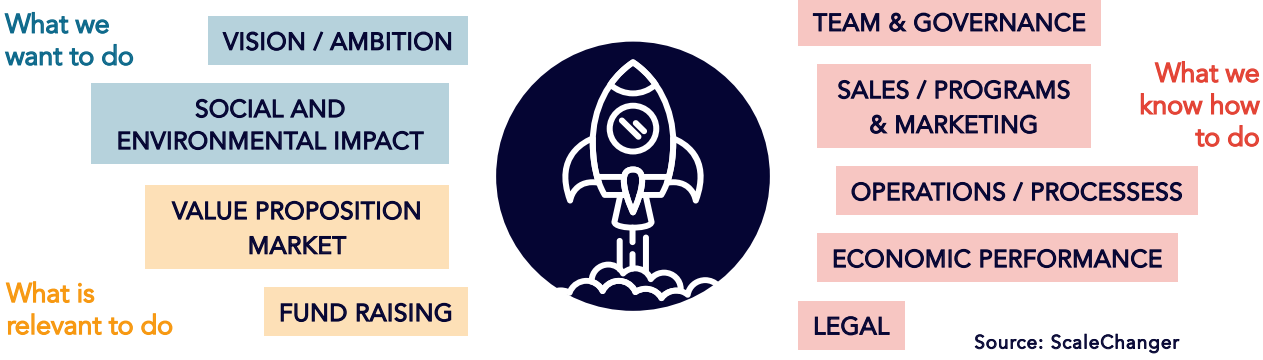
Why? A clear, well-defined strategy increases the likelihood of success by structuring the stages and minimising uncertainty. Detailed planning prevents projects from drifting off course and guarantees effective deployment. Scaling strategies are based on testable hypotheses to validate the choices made. For example, can the solution that works locally be replicated to another area? Would external stakeholders be interested in adopting the solution? Can the conditions for local success (e.g. funding and political support) be reproduced elsewhere / at a larger scale? Identifying these hypotheses and determining how to test them is an essential stage in developing a scaling strategy.

How? The SESOs work with the SE teams to translate scaling objectives into concrete steps and success indicators. This includes milestones, provisional budgets and responsibilities for each stage.

Depending on the chosen strategy, some areas will need to be explored in details:

- Governance
- Financing
- Internal and network organisation
- Business model
- Communication and advocacy
- Partnership strategy
- Modelling and passing on know-how

ESSENTIALS OF SCALING



Source: ScaleChanger

2. Structuring impact, operational and financial management tools

Why? The business plan outlines the path that the social enterprise envisages to take to achieve its goals. It is based on hypotheses that are stress-tested during its drafting. The piloting tools used to manage activity (operations), impact (monitoring and evaluation) and finances (sales/budget monitoring) will give the SE the means to quickly validate or invalidate hypotheses and adapt the strategy while limiting risks.

EXAMPLE

AlphaOmega Foundation (France)

Fondation AlphaOmega™

www.alphaomegafondation.com

AlphaOmega's team emphasises that, when scaling over a 10-year horizon, having a data-driven impact strategy is as critical as the financial plan. Treating impact metrics with the same discipline as cash-flow forecasts builds credibility with co-funders, reduces the risks associated with long-term scaling and safeguards the integrity of the organisation's mission over a decade-long horizon.



ROLE OF THE SESOs

The SESOs collaborate with the SE teams to translate scaling objectives into concrete steps and success indicators. This includes setting milestones, provisional budgets and responsibilities for each stage.

A key role at this stage is also to design low-risk tests to validate the assumptions on which the strategic choices are built; for instance, if the role of the organisation is evolving from direct delivery of service to training other service providers, a quick market research with potential trainees will validate whether there is a perceived need, demand and willingness to pay for the training.

STAGE 5

MOBILISING RESOURCES AND STAKEHOLDERS



OBJECTIVE

Secure the human, financial and partnership resources needed to effectively support the implementation of the scaling strategy.

KEY ACTIONS

1. Structuring the team and HR

Why? Scaling often involves major changes to the team, such as growth in numbers, geographical spread and the arrival of new profiles. It is essential to identify skill shortages and devise ways to address them, such as hiring additional HR staff or providing internal or external training. Changes in management practices should also be identified, such as internal coordination, motivation, career management, and so on.

How? The SESOs collaborate with the SE teams to support needs analysis and identify steps to meet them, such as recruitment, training and change management.

TOOL EXAMPLE

Impact Pitch Deck Template

www.viafund.net/crafting-an-effective-pitch-deck/

2. Mobilise the necessary resources.

Why? Without adequate resources, scaling can be compromised. Scaling requires significant financial resources, and SEs often require support to access this funding. SESOs provide access to a network of financial and technical partners, which is crucial for securing these resources.

How?

- Help recruit specific talent. Some SESO (eg: venture studio) do hire expertise and make it available to the scaling enterprise. In addition to those specific to the SSE, do not neglect "traditional" sources of investment (investors from the for-profit "traditional" economy sector).
- Identify sources of funding (grants from foundations, donations from general public, and investment from impact investors/funds) and facilitate meetings with appropriate funding bodie (public and private funds).
- Strengthen SEs' ability to present their projects by providing training in impact communication and storytelling, as well as support in preparing narrative and financial documents for fundraising and writing funding applications.

EXAMPLE

Paris Impact 2024

As part of the Impact 2024 programme for the Paris Olympics, several associations and sport federations received bespoke development support. Stakeholder-centred workshops helped them identify key funders and refine the value proposition for each one. These sessions provided each organisation with the clear arguments and practical tools needed to secure the human and financial resources required for scaling.

3. Identify and foster alliances

Why? Scaling impact will often imply to work with new partners. It might also rely on a change of the role of the SE with different stakeholders; for instance from service provider to trainer, or to become the animator of a network of local implementers, or to join already existing networks. In all cases, identifying the relevant partners and fostering alliances is key.

How? The SESO can support the SE in thinking through those alliances and partnerships: what kind of partners are we seeking? how do we get in touch with them? What are the fundamentals of our solution that cannot be influenced by new partners, and what part are we ready to co-create?

SESO can also guide on the design of networks: what is the shared ambition? which role(s) would each partner play (members, head of network) in reaching this ambition? What is the economic model of the network?

4. Structuring governance

Why? A poorly structured governance can quickly become irrelevant and potentially not supportive. Scaling often requires a change to the role, composition or functioning of governance bodies. This may involve introducing new expertise or new players to the decision-making bodies.

How? The SESO can help both governance bodies and leadership team take a step back, consider what changes might be needed and how to implement them in a consensual manner. These changes could include new voting modalities, new types of expertise required on the Board, or the creation of specific sub-committees (e.g. scientific advisory, risk, audit).

E-Graine

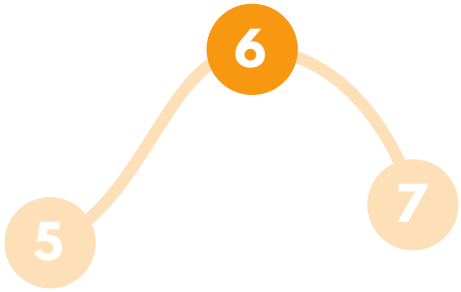
www.e-graine.org

E-Graine is a community education association that promotes civic engagement in order to create more welcoming, supportive and responsible communities, in France. Through educational projects, it equips citizens with the tools they need to understand social issues and become agents of change.

In 2023, e-graine received support from ScaleChanger and Impact Lawyers to overhaul the network's governance. A diagnostic assessment was conducted to evaluate the current structure against the organisation's ambitions, identifying needs, expectations, and challenges. The Board was then able to select the most suitable governance structure to support continued growth.

STAGE 6

LAUNCH OF PILOTS AND LESSONS LEARNED



OBJECTIVE

Test the chosen strategy in a limited context to validate its relevance, then make any necessary adjustment.

KEY ACTIONS

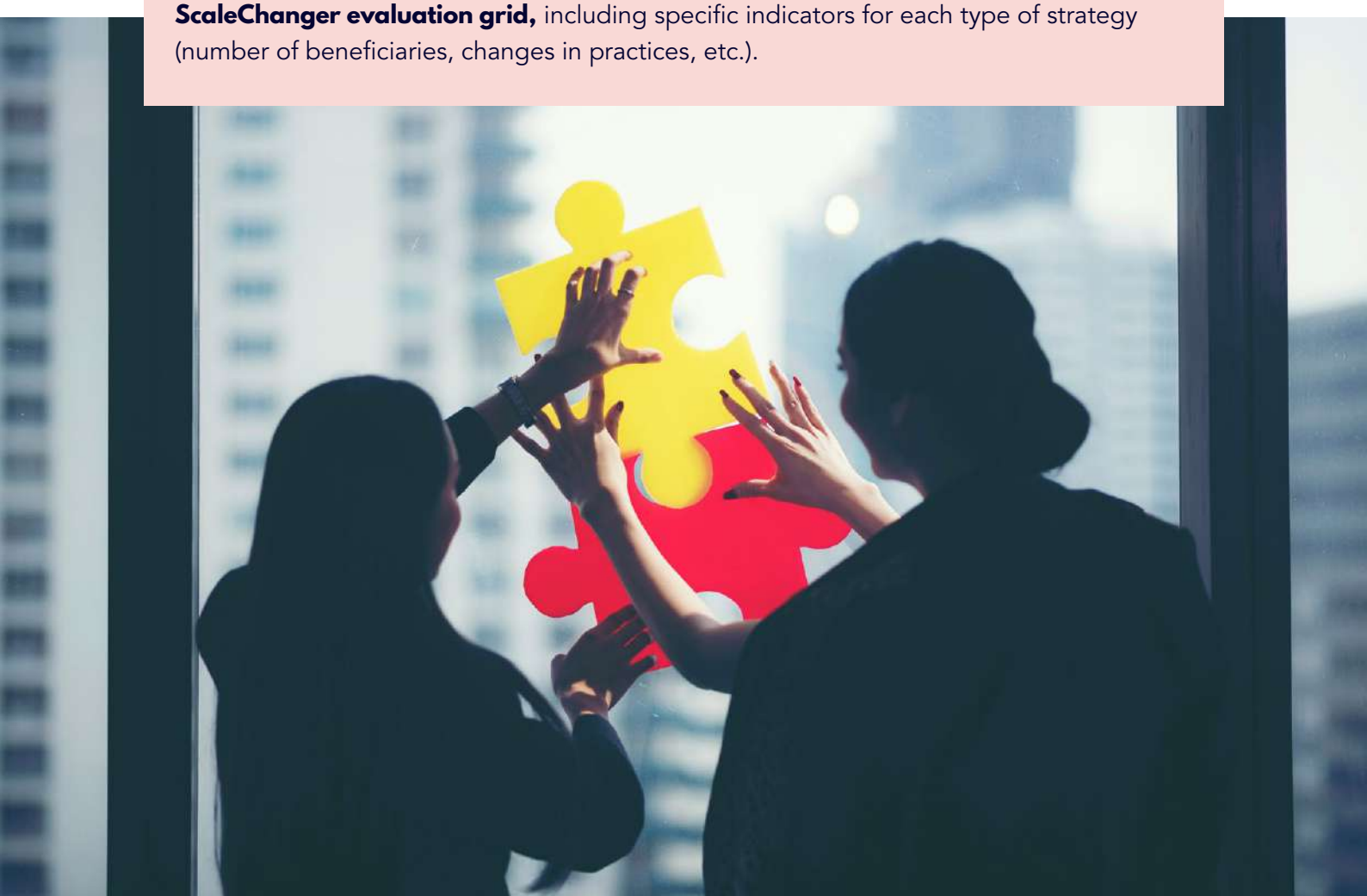
1. Design representative pilots.

Why? Testing on a small scale helps to reduce risks before a large-scale rollout.

How? Identify the hypotheses underlying the scaling strategy. These could relate to demand for a product or service, the existence of motivated entrepreneurs willing to replicate it, or the availability of financing. Select target areas or groups that are similar to the final deployment context and test these hypotheses as quickly and cheaply as possible. In a lean methodology approach, learn from these small-scale pilots before scaling widely. This will reduce the risks and potential losses.

TOOL EXAMPLE

ScaleChanger evaluation grid, including specific indicators for each type of strategy (number of beneficiaries, changes in practices, etc.).



2. Measuring pilot results.

Why? Accurate impact and financial data can be used to draw practical conclusions for improving the model. The piloting must confirm or refute assumptions, so measuring success objectively is important. This allows to take a step back from the proposed solutions and identify constraints and opportunities in the scaling strategy in good time.

EXAMPLE

Mots et Merveilles
(France)
www.asso-motsetmerveilles.fr

Mots et Merveilles fights illiteracy by providing support to individuals unfamiliar with written language and digital technology in a welcoming environment. It uses innovative, tailored methods, delivered by a network of volunteers who are mentored by professionals.

The approach was initially rolled out with a centralised model, and then expanded more broadly through a social franchise. The first phase helped the organisation understand the factors that contribute to local success, recruit project leaders and refine the antenna's business model — insights that were later embedded in the franchise blueprint.

How? SESOs provide a structured evaluation framework that maximises learning from pilots, assesses success and leverages test results with external partners. If necessary, the model can be adjusted. Implementing the strategy requires operational capacity, which is often underestimated, yet challenges relating to logistics, partnerships and human resources management must be overcome. Here are a few actions SESO can implement:

- Supporting operational implementation with tailored coaching or mentoring to meet specific needs.

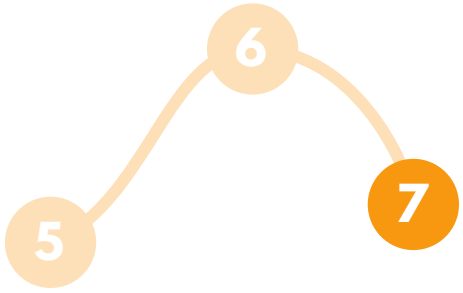
- Suggesting impact measurement tools, such as environmental, economic and social impact monitoring indicators and survey methodologies. Support SE in designing useful indicators beyond the number of beneficiaries: transformation rates; cost per "impact delivered". Support SE in adopting "good enough" indicators, that is simple but critical indicators that can be monitored at a reasonable cost/effort.

- Facilitate feedback and collective learning workshops to adjust the strategy before full deployment. Internal feedback is essential for each SE, but community and cohort facilitation, where several SEs share the successes and failures of their pilots, can also offer valuable insights.



STAGE 7

EXPANSION AND WIDE DEPLOYMENT



OBJECTIVE

Extend the model on a large scale to maximise its social impact.

KEY ACTIONS

1. Strengthening strategic partnerships.

Why? Partnerships offer complementary resources and encourage local integration. In new territories or in new sector of activities, SE do not necessarily have the right partners or networks already identified. Testing assumptions, about the willingness to cooperate, the time and effort each party is ready to put in a partnership, how difficult decisions will be taken, is a key step.

How? Identify local partners and building solid alliances.

2. Roll out gradually.

Why? Phased expansion limits operational risks.

How? Following a precise timetable and conducting regular performance monitoring.



ROLE OF THE SESOs

- The SESOs help the SEs to network and find reliable partners. The SESOs facilitate networking with strategic players such as public institutions, major companies and local associations, and they can also provide programmatic and technical support to design and formalise networks or partnership agreements.
- They give access to their contact directory for SEs.
- They also facilitate integration into regional or international social economy networks.

DESIGNING EFFECTIVE SUPPORT PROGRAMMES TO DRIVE SCALE.

A FEW GUIDELINES FOR DEVELOPING RELEVANT PROGRAMMES, MOBILISING THE NECESSARY RESOURCES, AND BUILDING STRATEGIC ALLIANCES

Scaling is a strategic and complex phase for social enterprises (SEs). As discussed in the previous section, SESOs play a pivotal role in offering structured programmes to meet the unique requirements of SEs and supporting them throughout their journey. This section presents a simple approach to structuring an effective scaling support programme for SEs. In the initial interviews conducted with SEs, many complained that scaling support programmes are often perceived as 'too generic', lacking strong insights into the local market and the specific SE regulations (with constraints on capital, profit and taxation that differ not only per country, but also per type of legal status). Furthermore, SEs require a favourable context in order to develop.



APPROACH TO BUILDING A SUPPORT PROGRAMME

GETTING TO KNOW THE TARGETED SE

In order to design the programme properly, it is important to have a clear understanding of the needs and challenges that scaling social enterprises face. The following questions will help the SESO assess its target audience:

- What are the unmet needs of social entrepreneurs in terms of development and scaling? What problems and constraints do they face?
- What are the local and sectoral priorities (e.g. renewable energies, social inclusion and target localities)?

Actions to be taken:

- Conduct interviews with social entrepreneurs, from all stages of enterprise maturity (start up/new founders; seasoned entrepreneurs)
- Talk to local/sectorial SESO and get their feedback about the need for support in scaling; the other programs offering similar services; the sources of funding.
- Analyse what are the critical needs of the community within the SESO scope to identify priority areas

The results to be obtained at this stage:

Understanding the needs and expectations of social entrepreneurs with relatively mature and developed projects.

EXAMPLE

UpSocial (Spain)
www.upsocial.org/en/inicio/

UPSOCIAL

UpSocial is a company dedicated to identifying, adapting, and scaling innovative solutions to social problems, ensuring they are effective, sustainable, and replicable across different contexts.

Based in Spain, UpSocial is a private consulting firm that does more than simply support social enterprises directly. It works to broaden access to social entrepreneurship, focusing on under-represented groups such as women, migrants, and entrepreneurs with lower levels of formal education. Through partnerships with organisations such as Ashoka Spain and the Open Value Foundation, UpSocial assists its clients, including governments and support organisations, in designing pilot projects that factor in these specific needs from the outset. This approach demonstrates the importance of in-depth insights into target groups to tailor support and maximise systemic impact.





BUILDING THE VALUE PROPOSITION AROUND THE NEEDS OF THE TARGET GROUP AND EXISTING SUPPORT SERVICES

Once the priority needs of the scaling SE have been clearly defined, the SESO will consider how they can be met in order to determine the value to be provided. Responding to local priorities (e.g. rural vs urban, green economy, blue economy, youth employment, senior employment) increases the chances of SE sustainability. It also enables local cooperation between structures such as academics, tech incubators, support for associations and 'traditional economy' SMEs. This enables SEs to spread their values and operating methods, which are centred on people and the planet, to the traditional economy.

Actions to be taken:

explore, benchmark and design

- Who, or what services, can meet the identified needs of the SEs?
- Do SEs need funding?
If so, from the accelerator or other partners?
- Do SEs need advice? From the accelerator team? Mentoring? Skills-based volunteering?
- Do SEs need market access?
What type of partners?
- Is it relevant to have sector specialisation?
- Conduct workshops and brainstorming sessions with the SESO team.
- Benchmark where relevant and discuss with other incubators and accelerators.
- Discuss with the following players in the local or regional ecosystem to find out what services they already offer, what gaps they identify for scaling SE?
    - Incubators in the 'traditional' economy
    - Universities and research centres
    - Consultancies
    - Entrepreneurial support agencies
- Identify SESO's value proposition around scaling and test it with social entrepreneurs

The results to be obtained at this stage:

Design the most relevant scaling support programme. Several SESOs in 'mature' ecosystems noted that some SEs were adept at being selected for support programmes and would sometimes receive or attend multiple programmes at very short intervals or concurrently. These SESOs viewed this as a potential missed opportunity, given that each programme requires attention and mobilises time and energy from the SE. This certainly calls for local coordination between SESO to define strong value propositions that will cater to the needs and aspirations of different segments of social entrepreneurs.

DESIGNING THE PROGRAMME, THEN BUILDING AN ACTION PLAN

Now that the SESO is clear about the programme's value proposition, it is time to consider its implementation.

Questions to address:

- What activities do we implement in which timeframe?
- Is this programme realistic and achievable?
- Under what conditions can it become a reality (business model, partners, etc.)?

Actions to be taken:

- Design and formalise the programme

The results to be obtained at this stage:

- A clear offer for the accelerator programme: target audience, value proposition, key activities, key partners, sources of revenue and expenditure, communication channels.
- A step-by-step action plan and a list of partners to mobilise

<table>
<tr>
<td>Key resources
Internal HR
Expert network
Training platform</td>
<td rowspan="2">Key activities
Source
Select
Design and run workshops
Build online resources repository
Broker relations</td>
<td>Type of intervention
Multichannel support to scaling SE</td>
<td>Beneficiaries
Social entrepreneurs contemplating scale; or scaling already.
They have a solid proof of concept, and established business models</td>
<td>Beneficiaries value proposition
Availability of high-level expertise in the areas that are problematic for them.
Choosing the right scaling strategy. Identifying and mitigating risks. Getting in touch with potential investors.</td>
</tr>
<tr>
<td>Strategic partnerships
Mentors
External experts
Partners
Media</td>
<td>Channels
In-presence workshops
Access to online resources
Monthly catch up online</td>
<td>Client / customers
Funder of the programme: local development agency.</td>
<td>Clients value proposition
Social innovations are scaled, faster, with less risk of failure: more SE succeed in scaling</td>
</tr>
<tr>
<td colspan="2">Cost structure
HR (permanent and on-call), offices, event organization, communication</td>
<td colspan="3">Key income
SE paying for services
SE through third party payment (donors funding SE to pay for support services)
Grants (EU, public donors)</td>
</tr>
</table>

Source: ScaleChanger

EXAMPLE: Social business model canvas of a scaling support program.

As a social entrepreneur would do, it is important for a SESO to consider the programme's entire business model to ensure its feasibility and sustainability: what is the value proposition to payers? How does it fit both their needs and the needs of the social entrepreneurs? Will income cover costs?



CORE COMPONENTS: A CLOSER LOOK AT THE MAIN SUPPORT ACTIVITIES

A scaling support programme must be designed as a structured yet flexible process that can adapt to the specific needs of SEs. The following fundamental elements contribute to its success:

SOURCING: IDENTIFYING SEs WITH HIGH SCALING POTENTIAL

The success of a scaling programme largely depends on the participants it selects. The greater the homogeneity of the participants, the easier it is to build relevant group coaching sessions. Hence having similar levels of maturity should be sought. This could either be "getting ready to scale" stage or the scaling stage. In the survey implemented by Scaling Catalyst, most social enterprises mentioned selection as a key success factor for scaling programmes in order to have similar questions and face comparable challenges.

However, it is difficult for many organisations to assess their scaling readiness. It is key that the SESO analyses the organisation's maturity level corresponding to its programme or/and vice versa, adapt its programme to the maturity level sourced. The importance is to have a coherence between the content and maturity level, to maximise the participants' experience and the impact of the programme.

How?

1. Publish clear criteria upfront, such as mission/market fit, evidence of impact, strength of revenue model and team commitment.

2. Stage-gate process:

- Flash assessment using a scoring grid or tool such as ScaleMeUp™ to create a shortlist.
- Deep-dive interview to test motivation, coachability, and fit with your offer
- Use a balanced scorecard to assess organisational maturity and scaling potential.

3. Check the availability of the founding team – even the best curriculum will not generate impact if the founders cannot engage.

EXAMPLE

ACT Grupa (Croatia)

ACT Grupa starts with an open call, with around 300 applicants. A jury scores each application against published criteria, such as team size and expertise, market validation, income streams and social/environmental innovation. The jury then narrows the pool to 20–30 finalists, who are invited to attend in-depth interviews on impact and coachability. Although transparency is key, only around 40 applicants read the criteria beforehand, which highlights the importance of active applicant education.

EXAMPLE

AlphaOmega Foundation (France)
www.alphaomegafondation.com

AlphaOmega applies strict selection criteria to identify charities with high scaling potential. Eligible organisations must have been active for at least three years, have an annual budget of more than €1 million, and reach more than 10,000 young people per year. The foundation currently supports only seven partner organisations, reflecting its strategy of concentrating substantial resources — up to €500,000 per organisation per year — on a small number of charities. These rigorous criteria ensure investment in well-established organisations that are ready for deep transformation and sizable growth in their impact.

Fairspace (France)
www.fairspace.fr

From an entrepreneur's perspective, success hinges on finding the right programme at the right time. Opaque assessments and glossy promises can leave founders uncertain as to whether a programme is truly suited to their stage. Fairspace advocates for signalling clearly the timing and benefits of the scaling program, so SEs can choose strategically and avoid programmes that are too early, too late, or misaligned with their growth challenges.

A rigorous, transparent sourcing funnel not only protects the accelerator's resources but also signals professionalism to investors and partners—laying the groundwork for credible scale stories.

TECHNICAL SUPPORT Support in the different stages of the change of scale:

Diagnostic	Scaling strategy	Strategic planning and preparation	Fundraising of pilots and lessons learned	Launch of pilots and lessons learned	Wide deployment
Conduct an analysis: • internal • strategic • external	Choosing the most appropriate scale-up strategy in view of the objectives	• Formalize the action plan • Evolve the current business model	• Preprare for fundraising: identity financial partners, estimate the amount needed, make BP, etc. • Engaging stakeholders	• Accompany the launch of pilots, iterate, etc. • Capitalizing on lessons learned	• Supporting the wide deployment of the project • Systematize processes

Source: ScaleChanger

Why? Social Enterprises often encounter obstacles related to legal, tax, strategic, organisational or operational issues in the scaling phase.

How? Provide specific technical support, for example:

- Identify expert profiles with the capacity to support mature entrepreneurs, i.e. experts with specialised strategic and technical experience and know-how, or former entrepreneurs who have themselves experienced a scaling journey.
- These experts often work in a network. The experts may be internal members of the accelerator/support organisation or external partners (service providers or pro bono volunteers).
- Ideally, technical support is provided on a one-to-one basis with the entrepreneur, responding directly to their specific challenges. Group sessions are also held to share best practice among peers.

Here are some examples of important topics to include:

- Build a sustainable business model
- Understand the pros/cons of each scaling strategy
- Access to experts for quick answers on labour or sales regulations, registrations/certifications and tax advice.
- Legal assistance for network/social franchise agreements or strategic partnerships,
- Logistical support for deployment in new territories,
- Upgrade or change the digital tools to improve processes
- Getting investment-ready

All the SEs and SESOs surveyed highlighted that technical or managerial expertise for the incubation stage was fairly easy to access. However, they also pointed out that, when scaling, social enterprisess are faced with issues that often require more in-depth expertise in areas such as strategy, business modelling, digitalisation, marketing, financial analysis and HR management. They added that the required experts need to be more experienced and seasoned than those involved in the incubation stage. This is also why scaling support programmes tend to be more expensive to implement than incubation programmes.

EXAMPLE

AlphaOmega Foundation (France)
www.alphaomegafondation.com

Fondation AlphaOmega™

The AlphaOmega Foundation provides highly personalised technical and operational assistance. For example, two people of their team members were directly involved in regional management, integrating '100 000 Entrepreneurs' staff into 'Entreprendre Pour Apprendre' during their merger. They assumed full responsibility for the entire process, overseeing six major work streams (offering, business model, digital matters, governance, and so on) and coordinating the 2 charities' teams. This level of hands-on involvement is essential when partner charities, despite being leaders in their field, lack the human resources required for complex projects.

EXAMPLE

ScaleChanger (International)
scalechanger.org

ScaleChanger provides extensive strategic and operational support, including diagnosis, modelling, strategic planning and implementation. Boasting broad expertise in areas such as strategy, financing, organisational diagnosis, impact assessment, change management and international partnerships, their team deploys these skills to assist their partner organisations. This comprehensive technical support is essential for overcoming the complex challenges of scaling up.



MENTORING, COACHING AND PEER EXCHANGES

Why? Social entrepreneurs have a wide range of needs, such as strengthening their leadership skills, improving their project management and raising finance. They often feel isolated in facing unique challenges, and meeting experienced entrepreneurs who have faced the same barriers or challenges is an opportunity to take a step back and learn. With peers, outside of their teams, they will also discover other points of view on shared challenges - here again an opportunity to grow and overcome challenges.

Who?

- A mentor is a more experienced entrepreneur, someone who listens, shares his or her experience, offers an outside perspective; in scaling support programs, mentors usually have experienced scaling.

- A coach usually has a different skill set, and guides self reflection for the entrepreneur to make decisions by himself

- Peer exchanges are usually built-in collective programs, with cohort exchanges. Even in individual support program, exchanges with enterpreneurs having faced similar barriers can be organised.

How? Managing a mentoring programme requires developing a network of mentors and being explicit about expectations on both sides.

Depending on the requirements, one mentor can be used over a long period or several expert mentors can be used to meet the social enterprise's various needs. Generally, mentors and mentees are matched by the SESO, and both undergo onboarding in the mentoring approach. A clear contract setting out the objectives and obligations of both parties is also drawn to ensure a fruitful collaboration.

EXAMPLE

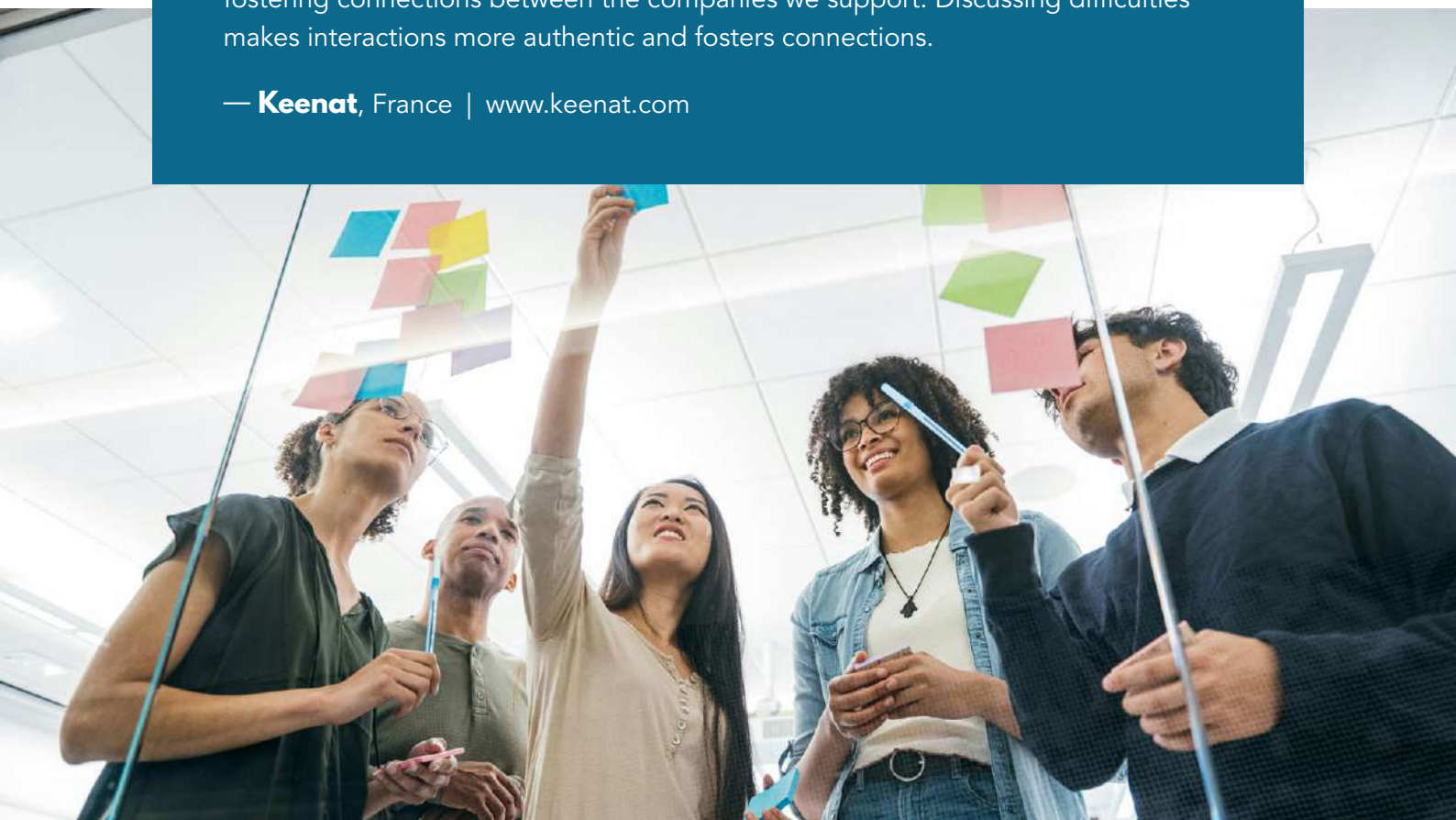
Ashoka (International)
www.ashoka.org

Ashoka considers its mentoring from Ashoka support network, as well as the lifelong support from Ashoka Fellows on an international level to be a 'best practice'. The Ashoka Support Network (ASN) is a global community of leaders and philanthropic entrepreneurs from various sectors. Financially committed, they invest personally in Ashoka and the social entrepreneurs in the network, contributing their skills and networks. This process enables social entrepreneurs to benefit from personalised support and access a global network of experts and partners, both of which are crucial for successful scaling.

Impact Shakers
(Europe)
www.impactshakers.com

Impact Shakers takes a holistic approach, placing founder well-being at the heart of everything they do. They have developed a five-tiered 'Wellbeing Value Chain' and provide partnership coaching for co-founders, as well as founder circles for CEOs and CTOs. They have even embedded a "Wellbeing Clause" in their investment contracts, underlining their commitment to reducing burnout and team conflict, which are common causes of start-up failure. This personalised focus on personal development and team dynamics complements their strategic and financial support, helping founders to stay resilient during scaling.

> Finally, events such as Fuck Up Nights, where entrepreneurs share their failures rather than always talking about their successes, could be an excellent way of fostering connections between the companies we support. Discussing difficulties makes interactions more authentic and fosters connections.
>
> — **Keenat**, France | www.keenat.com



NETWORKING: INTEGRATION INTO A CONDUCIVE ECOSYSTEM

A scale support programme is designed within a network or ecosystem, and providing access to people from different stakeholders such as local authorities, donors and investors, professional networks or offering a range of skills (legal, financial and strategic) and resources (finance and infrastructure) increases the chances of success.

Why? To make the social enterprise visible to target audiences (private players, institutions, the general public, etc.). It also provides opportunities and outlets for customers, suppliers and investors.

Who is involved? Various partners who can help to accelerate SE in one way or another, such as customers, suppliers, the media, partners and institutional players.

How? By organising networking events, preparing social entrepreneurs for the pitch in advance and identifying relevant players. SESO can set up strategic partnerships with local stakeholders (local authorities, businesses and professional networks) to connect social enterprises (SEs) to a solid network, especially potential funders (business angels, banks and investors). This also enables local structures to cooperate (with academics, tech incubators, associations and "traditional" SMEs) and develop SSE in a given area.



EXAMPLE

Social Innovation Factory (Belgium)

Twice a year, Social Innovation Factory runs 'Acceleration Days' for social enterprises with clearly defined needs, usually relating to financing or strategic partnerships. A carefully curated guest list of seasoned entrepreneurs, funders, members of the media, and policymakers meets each social enterprise in four tightly timed 20-minute slots, ensuring that every participant leaves with concrete advice and new valuable contacts.

In addition, the 'Scalers Club' brings together eight ventures at a similar growth stage.

The cohort bonds during a two-day residential kick-off event focused on the entrepreneurs, after which SIF co-designs a bespoke programme with experts. Founders of large social enterprises share candid success and failure stories. The result is a peer-learning environment that combines targeted technical input, experienced mentorship and access to a rich ecosystem—exactly the mix required for effective scale support.

ACCESS TO FINANCE

Why? Scaling rarely happens without fresh capital or funding, both to cover day-to-day working cash flow needs and to underwrite the next growth leap. Therefore, a robust programme helps social enterprises to secure and manage the right mix of funding.

Who is involved? On one hand, SESO staff can provide an external review to pitch decks, proposals… organising networking events gathering potential funder or investor is also valued by social entrepreneurs.

How? Key point: Investors evaluate financial and impact returns. Tailoring the narrative to each audience and anticipating post-investment requirements greatly improves closing rates and long-term outcomes.

What is financed?	By whom?	Typical instruments	How the SESO adds value
• Operating cash-flow • Expansion into new territories • Product/tech upgrades • Investment in processes upgrated	Impact VCs, business-angel networks, banks, public funds, philantropists, corporate impact vehicles — sometimes the accelerator's own fund	Equity, quasi-equity, bank loans, recoverable grants, social-impact bonds, revenue-based financing, grants	• Investor mapping and warm introductions • Pitch/demo days • One-to-one deal prep (economic and financial modelling, impact metrics, due-diligence pack) • Post-deal support (governance, reporting, cash-flow planning)

Source: ScaleChanger

> Access to finance is the main scaling hurdle, especially for women entrepreneurs: barely 2 percent in France of fundraising targets women-led projects. Even when impact-driven ventures succeed, the process is lengthy and complex. Banks, focused on profitability, view hybrid models that blend earned income and grants as risky—particularly amid economic uncertainty—so in 2024 many social-economy organisations saw their banks withdraw support. While support programmes do expand networks, they still struggle to convert connections into concrete capital, especially from business angels and other non-traditional investors.
>
> — **La Ruche**, France | www.la-ruche.net

EXAMPLE

FASE (Germany)
www.fa-se.de/en

FASE positions itself as the go-to expert for growing social enterprises seeking financial support and is a trusted advisory firm dedicated to mobilizing capital for impact ventures across Europe. It provides support throughout the entire fundraising journey, from preparation to contract negotiation. Services include providing advice on overall funding strategy, reviewing business and impact models, financial planning, identifying suitable instruments and preparing all key documents (pitch deck, investment deck, etc.). FASE also coordinates management presentations and supports the enterprises through due diligence and the contract phase. The organisation's strength lies in matching companies with the right investors and employing a flexible 'financing toolbox' for hybrid and blended solutions.

> Although many social enterprises are well prepared at raising capital, few are prepared for what happens next. Keenat argues that SESOs should offer a dedicated post-fundraising module that covers the post-deal realities, such as executing the growth plan, managing cash flow, meeting investor reporting duties, and scaling the team. Clear guidance on these issues would enable founders to convert fresh capital into measurable impact more quickly.
>
> — **Keenat**, France | www.keenat.com

COMBINING SEVERAL ELEMENTS AND THE IMPORTANCE OF CUSTOMISATION/FLEXIBILITY

The Scaling Catalyst survey revealed that many social enterprises expressed a strong need for highly personalised support programmes—allowing them to skip content they already master and access "tailor-made" technical assistance on demand, rather than standardised, one-size-fits-all training sessions. At the scaling stage, SEs already have diverse strengths, backgrounds, and experiences, which translate into different capabilities and knowledge bases. When a programme is overly standardised, participants often feel they are not making the best use of their time.

Social enterprises generally prefer short, practical, and less theoretical modules that provide ideas they can test or implement quickly. They also value a mix of group and individual learning formats. Group sessions enable peer learning and knowledge exchange on key topics—such as hiring beyond the founding team, managing partner relationships, or giving constructive, pragmatic feedback on business plans and financial projections.

Designing an effective support programme therefore requires striking a balance between creating shared momentum through collective sessions and adapting content to the specific needs and maturity levels of each SE.

Field data from Reach For Change shows that each component has a different effect: money alone increases reach, training improves internal practices, and networks contribute to both, confirming that an integrated package is more effective than isolated services.

EXAMPLE

Mikrofonden × Coompanion (Sweden)

Mikrofonden issues micro-loans, while Coompanion delivers tailored technical support. Together, the duo offers a "finance + capacity" bundled package that enables social enterprises to absorb capital and deploy operations effectively.

Avise (France)

Having audited dozens of accelerators, Avise warns that 'single-service' offers (such as 100% mentoring or 100% funding) rarely meet the critical needs of scaling ventures. A blended approach consistently delivers stronger outcomes.

Reach for Change (International)
www.reachforchange.org

Reach for Change has learned that combining three areas of support—capacity building, financial backing, and network access—significantly boosts the odds of success for social enterprises aiming for scalable, sustainable solutions. Its scaling-readiness programme integrates all three pillars, providing personalised support to help leaders apply existing knowledge to new contexts or overcome specific challenges. This 'hands-on, one-to-one' approach also enables CEOs to balance programme participation with the everyday demands of running their organisation.



STRUCTURE

ONLINE OR FACE-TO-FACE?

Most programme formats combine face-to-face and online learning. For social entrepreneurs, this has practical implications: in-person sessions require additional time for travel as well as expenses related to transportation and accommodation. However, several feedback reports note that distance-only programmes tend to experience higher drop-out rates, while face-to-face sessions create a more engaging environment that is conducive to deeper reflection, stronger peer dynamics, and ultimately more meaningful behavioural change for entrepreneurs.

EXAMPLE

Fairspace (France)
www.fairspace.fr

Fairspace sustainably furnishes workspaces by combining furniture reuse and custom design. Officially founded in 2020, the company sells eco-responsible, upcycled furniture manufactured locally in France and Europe, while collaborating with users to design optimized spaces that meet their needs.

For Fairspace, one of the major strengths of the programmes is the opportunity for entrepreneurs to interact with each other. These interactions enable participants to share experiences, learn from each other's successes and failures, and find collective solutions to the challenges they face.

WHAT IS THE BEST DURATION?

Most acceleration programmes run for three to six months (62%) or six to twelve months (25%). In practice, however, the full scaling journey typically spans up to three years. Social enterprises therefore express strong demand for tailored, modular programmes that allow them to engage with specific components as needed, without overburdening their teams. When providing individualised support, it is important to adapt the timeline to the rhythm at which each SE is able to implement changes. This pace will vary depending on the complexity of their chosen strategic paths, their internal decision-making processes, and external factors such as fundraising cycles or regulatory developments.



How to Structure the Support Programme

Design the programme over a period of at least **six to twelve months**, allowing enough time for sustained engagement and meaningful progress. Ideally, plan for a less intensive but significant support for the next 3 years.

Key components may include:

- **Initial diagnostic:**
  Conduct a thorough assessment to identify each SE's priority needs, organisational challenges, and scaling objectives.

- **Regular workshops:**
  These collective sessions build momentum, encourage peer learning, and introduce practical tools that participants can quickly test and implement.

> One challenge is the short timeframe of the programmes (10 months), whereas the timeframe for scaling up is longer.
>
> — **Avise**, France | www.avise.org

- **Individual follow-up sessions:**
  Provide customised one-to-one sessions between workshops with experts, coaches, or mentors whose profiles match the needs of the project leaders. When relevant, differentiate between:
  - **Individual support for the SE leader,** and
  - **Strategic support** by mobilising specialised expertise (e.g., legal, partnerships, governance) when required.

- **Targeted and deep-dive technical assistance:**
  Offer tailored expert missions focused on the priority needs identified in the diagnostic phase. These missions should be long enough to work in depth with the SE's founder and team, address critical issues, and support real organisational transformation. Tailored deep dive support enables deeper operational change that goes beyond leadership and effectively reshapes organisational practices.

- **Final evaluation:**
  Assess the progress made, analyse the effects of the support process, and co-define the next steps in the scaling journey.

EXAMPLE

AlphaOmega Foundation (France)
www.alphaomegafondation.com

Fondation AlphaOmega™

AlphaOmega stands out for its exceptionally long support horizon of ten years per association. The foundation believes that scaling up in the education sector is a long and complex process. A decade-long commitment enables AlphaOmega to get to know teams "inside out", build mutual trust, and engage operationally to shape future structures rather than merely fixing past gaps. Having initially considered five- to seven-year engagements, the foundation recognised that education requires an even longer timeframe for organisations to reach critical mass in terms of their structure and impact.



FINDING THE SESO BUSINESS MODEL

In the initial Scaling Catalyst survey, SESOs identified a wide range of funding sources, including social enterprise membership fees, grants from the European Union and local governments, and private philanthropic contributions. Only a small minority relied on equity instruments, although some venture funds—such as Rethink Ireland—combine investment with advisory support to help SEs scale.

A scaling support organisation must cover three distinct categories of costs:

- **Core organisational costs,** including staff time for diagnostics, coordination, internalised coaching, and network curation;
- **Support costs,** including externalised assistance, logistical costs, communication;
- **Direct support to SEs,** such as grants, loans, and access to technical experts.

Because no single funding source reliably covers those three categories, the most resilient SESOs use a blended financing model. This often includes a mix of public funding, private philanthropy, and earned income, occasionally complemented by equity or debt participation.

Lever	Strength	Watch-outs
Grants / subsidies	Keep programmes free for SEs; signal public interest	Annual renewals create uncertainty; rigid project management rules limit agility and adaptability to SE needs
Corporate and philanthropic support	Brings cash, mentors, visibility	Can drift focus toward funder priorities
Fee-for-service / consulting	Unrestricted revenue; strengthens market credibility	Needs dedicated sales capacity May restrict access of SE who can't afford the fees.
Equity / debt instruments	Aligns long-term incentives; potential upside	Locks cash, requires portfolio management skills

SNAPSHOT OF REAL-WORLD MIXES

Rethink Ireland (IE)

Rethink Ireland uses a hybrid venture philanthropy model. Dormant public funds from the Irish government are matched with private and corporate donations. Alongside cash grants, Rethink Ireland provides capacity-building and social finance opportunities, offering 360-degree support to awardees for sustainable growth. Although this model is competitive and demanding for grantees, it secures multi-year resources and allows experimentation with innovative financing methods, such as non-repayable loans that improve investment readiness.

Up Social

Up Social's economic model is based on revenues from consulting contracts with a diverse range of clients, including governments, private foundations, development agencies and corporate partners. The organisation also receives occasional funding from EU programmes.

ACT Grupa (HR)

Four revenue streams: state-funded NGO training, EU-financed capacity building, corporate-sponsored accelerator, and paid consulting/reporting services (≈ €0.5 m yearly).

Reach for Change (SE)

100% grant-funded support, free to SEs. Project-based budgets ensure accountability but leave little room to pivot during delivery and can cap staff costs critical to in-house expertise.

La Ruche (FR)

Relies on public subsidies and private sponsorship; some programmes shift part of the cost to corporate beneficiaries and use convertible-bond mechanisms to lighten entrepreneurs' cash burden. Main risk: dependence on yearly renewals.

Visas Iespējas (LV)

"Pay-it-forward" peer model: each entrepreneur mentored today commits to mentor another tomorrow—multiplying learning while minimising cash outlay.

Having a diverse, mission-aligned funding mix — ideally with multi-year, flexible components — enables an accelerator to sustain its own capacity and provide social enterprises with the right blend of funding, expertise, and networks needed for scaling.



MEASURING THE IMPACT OF PROGRAMMES

The results of a scaling support programme must be rigorously measured to enable learning and continuous improvement. Robust impact measurement is essential for SESOs seeking to maximise the effectiveness of their interventions and refine their support models over time.

That said, caution is needed when interpreting and attributing results. While programme selection is a key success factor, it also introduces an evaluation bias: if participants are already highly likely to succeed, how much of their progress can genuinely be attributed to the programme? In addition, many SEs participate in multiple support initiatives, sometimes concurrently. This overlap makes it difficult to determine which programme contributed to which outcome—or whether the achievements result primarily from the SE's own trajectory. As a result, "claiming" impact requires a nuanced approach that recognises these attribution challenges.

DEFINE KEY PERFORMANCE INDICATORS (KPIs)

An effective scaling programme requires a well-structured dashboard. For each KPI, set a baseline, a target and a collection schedule, as well as a measurement method (e.g. survey, financial statements or field observation).

Objective	Core KPI	Sample Target and Method
Programme reach	• Total number of SEs supported • Selection rate (applicants ÷ accepted)	40 SEs per year; 25% selection rate (application + interview)
Capacity building	• Average skills score (pre/post test) • % of team members trained	+30% on the "financial management" self-assessment scale three months after training
Social / environmental impact	• Number of beneficiaries served by the SE • CO_2 avoided, jobs created, waste diverted, etc.	+10 000 beneficiaries reached 18 months after programme (SE-reported data, spot-checked)
Economic performance	• 24-month survival rate • Median annual turnover or budget • Share of earned revenue	80% survival; +25% median turnover in Year +1 (audited accounts)
Satisfaction & engagement	• Net Promoter Score (NPS) • Overall satisfaction index	NPS ≥ 60, captured online mid-programme and at completion
Diversity & equity	• % of women / under-represented founders accepted • Urban–rural mix	≥ 40% women founders per cohort; at least 30% rural Ses

EXAMPLE

ACT Grupa (Croatia)
www.act-grupa.hr

ACT Grupa tracks three indicators — skill (self assess increase in skill, both founder and team members), organisational capacity (number of employees, to what extent did the program positively contribute to increase in social impact of company), and confidence (self reporting on confidence with particular sets of knowledge) — for both founders and their teams, and has recorded steady gains in all three areas after each cohort.

SMION (Croatia)
www.smion.com

Its tech incubator/accelerator gathers feedback from participants after the programme and uses the Net Promoter Score (NPS) to benchmark every cohort and fine-tune its offering.

Because selection bias and overlapping support can blur causal links, complement long-term KPIs with:

- a perception question – "To what extent did this programme contribute to your result?" (1–5 scale);
- a comparative baseline – e.g., previous cohorts or a small control group, when feasible.

Reach for Change (International)
www.reachforchange.org

Reach for Change uses a standard set of outcomes and indicators for each scaling readiness programme. They track growth metrics such as the number of beneficiaries reached, financial results, geographic footprint and staff numbers. They also use their proprietary Development Tracker to measure increases in knowledge and the integration of scaling practices. These quantitative indicators help to align support with clear objectives and monitor enterprise progress. Qualitative information is gathered through 'impact stories', which are short narratives based on interviews with the entrepreneur's beneficiaries that demonstrate the impact on individuals.

To estimate a counterfactual scenario in a way that is less demanding of resources than comparative studies, Reach for Change conducts shadow controls with the target group, asking the social entrepreneurs how they believe their organisation would have developed without the programme.

ScaleChanger uses a two-level impact measurement method:

1. Data collection immediately after support is received to assess the effects on the project leader and their organisation,

2. A survey several years after the support mechanism to measure the results in terms of impact trajectory (increase in the number of beneficiaries reached, quantitative improvement in impact, internal evolutions and improvements, ability to implement the scaling strategy, to build partnership, to raise funds, etc.). Portraits and impact stories also help to showcase the results achieved thanks to our support.

Collecting data 12–24 months after the programme ends is time-consuming. Budget for staff time in advance and automate data capture using a shared dashboard or CRM system to ensure you can track progress and make continuous improvements.

QUALITATIVE ASSESSMENT METHODS

Quantitative KPIs show you what has changed, while qualitative tools explain why and how it happened by revealing blind spots that numbers alone cannot identify.

Use the methods below in combination to gain a comprehensive, 360-degree view of programme performance.

Method	Why use it?	How to implement?	Field example
Testimonials from SEs	Capture first-hand reflections on programme strengths, pain points and unexpected outcomes.	Request short written or video testimonials with a few open questions (e.g. "How did the programme change your growth path?"). Repeat 6–12 months later to gauge durability.	La Ruche (FR) gathers testimonials at entry, mid-point, exit, then 6 months, 1 year and 3 years post-programme. Its Pollen alumni community keeps founders engaged and supplies follow-up data.
Case studies	Offer vivid, credible proof that the programme helps ventures scale—and inspire peers.	Document the journey: initial challenge, support received, obstacles overcome, and measurable results. Include quotes, timelines and before/after metrics.	Mouvement Impact France publishes an annual Impact 40-120 index: 120 high-potential firms (40 "flagships") profiled through thematic days co-hosted with partners such as La Ruche, Makesense and INCO.
Semi-quantitative surveys	Blend subjective perception with simple metrics to produce an overall satisfaction score.	Distribute online questionnaires with Likert-scale items on training quality, tool usefulness, mentor fit, etc., plus comment boxes for nuance.	Mouvement Impact France: baseline vs. post-programme self-rating of skills (1–5) and an NPS question ("Would you recommend this programme?"). A QR code on the final slide secures ~50% instant responses; individual follow-ups raise the total.
(Optional) External labels / indices	Add third-party validation for funders and prospects.	Apply for recognised labels (e.g. B Corp) or aim to feature in respected rankings.	Mouvement Impact France's Impact 40-120 index doubles as external endorsement for participating ventures.

EXAMPLE

Impact Shakers

Impact Shakers (Europe)
www.impactshakers.com

Impact Shakers combines quantitative and qualitative assessment. Beyond business metrics (revenue growth, funds raised) and impact measures (Impact Readiness Levels, bespoke KPIs), they track founder wellbeing and personal development, plus awards and recognition earned by portfolio companies. A dedicated Impact Committee sets KPIs, which are tied to the fund's general partners' incentives—ensuring strong alignment between financial and impact returns. This integrated approach provides a 360-degree view of both programme performance and enterprise outcomes.

Triangulating testimonials, case studies and survey data turns feedback into actionable insight—fuel for continuous improvement and a richer story for funders and future participants alike.



CONCLUSION

TOWARDS SUSTAINABLE, HIGH-IMPACT SCALING SUPPORT PROGRAMS

This guide has highlighted a central imperative: to address global challenges and maximise their positive impact, social innovations must be able to scale. Yet scaling is rarely straightforward. Social enterprises (SEs) typically face a wide range of obstacles—related to leadership, strategy, organisational development, financial sustainability, legal frameworks, and external operating environments.

This is precisely where Social Economy Support Organisations (SESOs) play a crucial role. Acting as catalysts for change, SESOs provide structured and tailored support that helps SEs navigate the complexity of scaling. Importantly, SESOs can operate in multiple ways: some design comprehensive programmes with a strong emphasis on group sessions and peer learning, while others focus on highly personalised, one-to-one support delivered on an ad hoc basis rather than through a formal programme structure. Both models have value, and choosing the right approach depends on the SESO's mission, resources, and the specific needs of the SEs they accompany.

At the same time, SESOs face their own challenges, including stabilising their economic model, building specialised expertise in scaling processes, standardising tools without losing flexibility, and identifying high-potential SEs to support.

This guide has sought to outline a methodical approach to help SESOs clarify their target audiences, craft a compelling value proposition, and design effective support programmes. By engaging in ongoing dialogue within their networks and sharing knowledge and practices, SESOs can continuously refine their methodologies and strengthen their collective impact—ultimately enabling many social innovations to scale successfully.





ANNEX 1

CASE STUDIES

ALPHAOMEGA FOUNDATION

Fondation AlphaOmega™

Who we are?

Founded: 2010

Team: 12 people
Social Investment Team: 5 people;
Expert Team: 6 people;
Senior Management: 1 person

Geographic area: France – national reach

Number of supported organizations / beneficiaries: 7 partner NGOs, each reaching 10,000+ young people per year

Themes & sectors supported:
Education & youth employability

Focus on scaling:
100% of activities dedicated to scaling

About

To foster the educational success of underprivileged youth by providing long-term strategic, operational and financial support to high-impact NGOs on their scaling journey.

What we do?

- Multi-year grants up to €500k per non profit organization per year for 10 years
- Hands-on strategic and operational guidance from in-house professionals
- Access to a skills-based volunteering network (digital, HR, management, etc.)

Methodology

AlphaOmega applies a venture-philanthropy approach inspired by private equity. A 6–9-month deep-dive diagnosis leads to a 3–5-year development plan. Our mission is to support senior management in developing their strategic plan and to support operational teams in implementing the plan. To do this, AlphaOmega works on all aspects of an organisation: strategy, governance, operational efficiency, digital, organisation, finance, fundraising, etc.

CHALLENGES & BEST PRACTICES

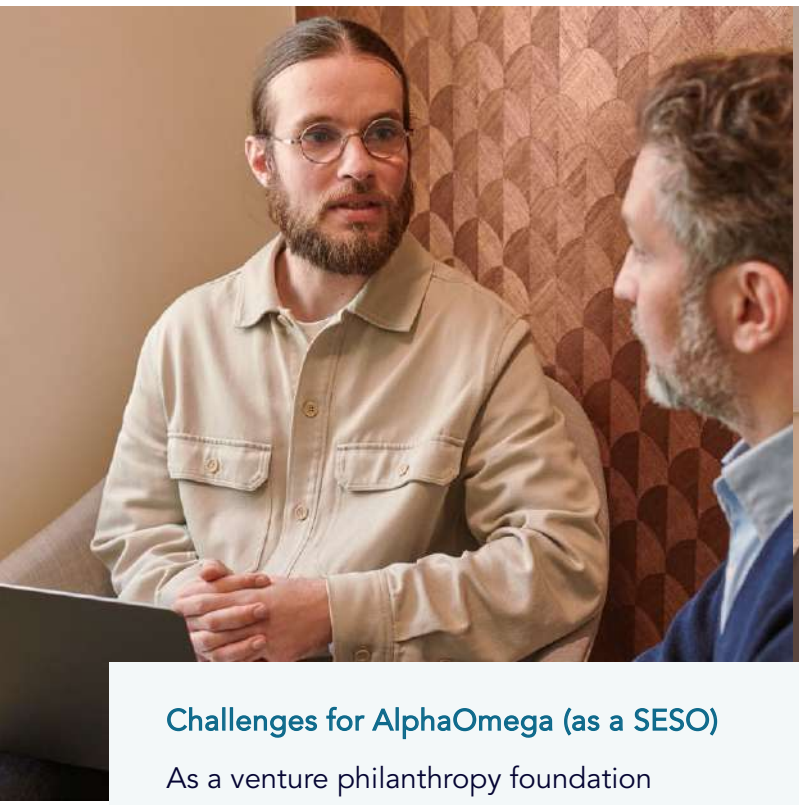
Challenges for NGOs in the Scaling Process

The associations supported by AlphaOmega frequently encounter internal and external hurdles when attempting to scale their operations:

- **Structuring for scaling** NGOs face difficulty structuring their organizations to accommodate change and high-velocity growth. AlphaOmega's intervention focuses on helping them achieve a structural baseline (remise à niveau) so they can proactively envision their future structure, rather than simply trying to catch up on existing organizational deficits.
- **Securing long-term financial resources:** a constant and significant obstacle is the lack of stable, perennial financial resources required to sustain significant growth and investment.
- **Accessing specialised expertise:** Associations often require specific, high-level expertise necessary to support growth, particularly functions typically found in the private sector, such as finance, strategy, and digital knowledge.
- **Building robust data systems for steering impact and finance:** Many associations struggle to effectively manage and monitor their finances, activities, and overall impact. They often fail to see the immediate benefit of structuring data from the outset. AlphaOmega recommends implementing a CRM (Customer Relationship Management) system for improved steering. Furthermore, continuous improvement efforts based on impact data are often lacking, as organizations may collect data without fully understanding its purpose or how to leverage it for continuous improvement.





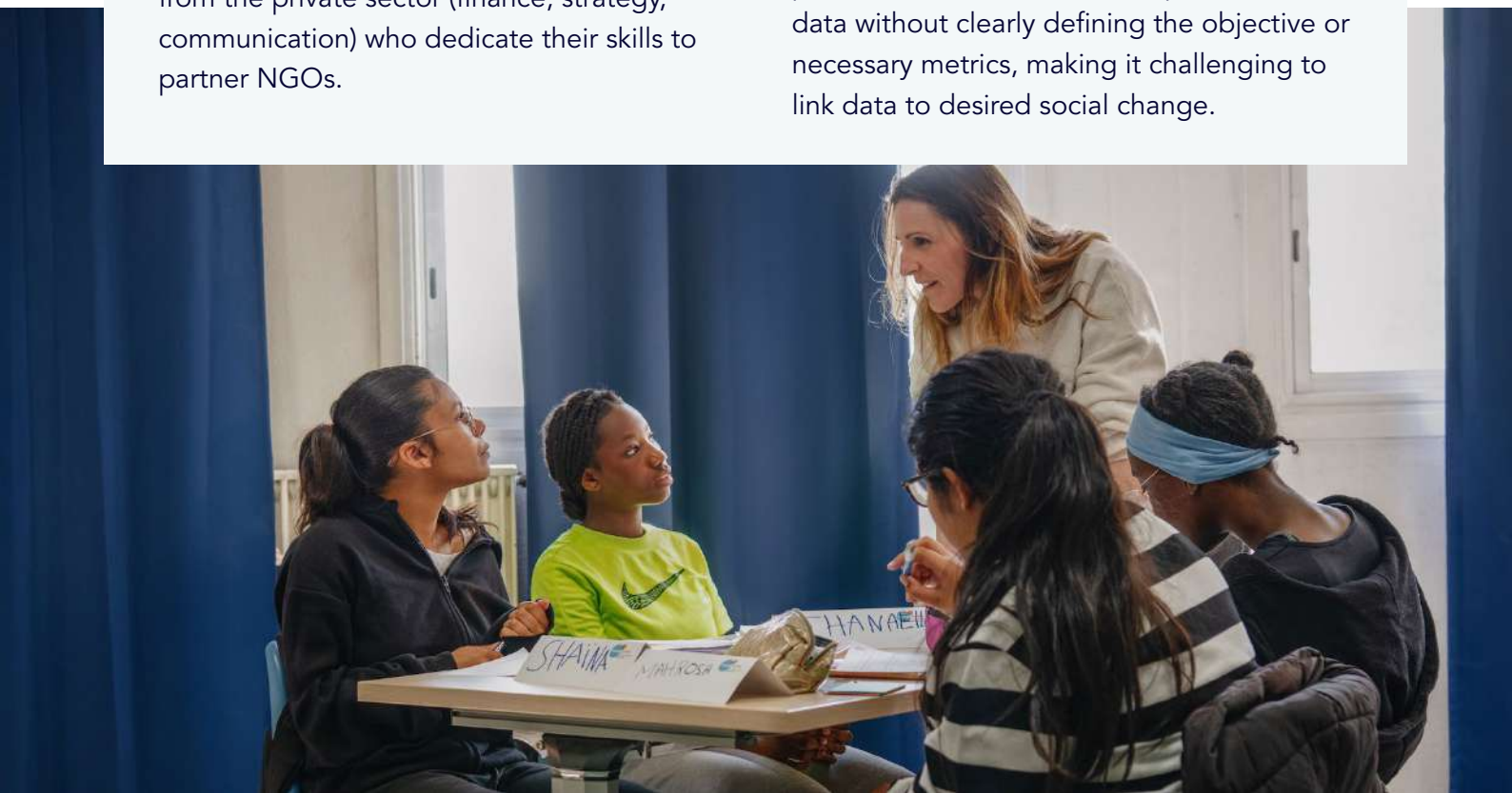




Challenges for AlphaOmega (as a SESO)

As a venture philanthropy foundation providing "deep support," AlphaOmega faces specific operational and strategic limitations:

- **Mobilising significant resources for deep support:** To provide high-quality, in-depth strategic and operational guidance, the foundation must commit substantial resources. The foundation's team is composed of professionals drawn from the private sector (finance, strategy, communication) who dedicate their skills to partner NGOs.
- **Convincing donors to commit over the long term:** Since scaling social impact, especially in the education sector, is a highly protracted process (estimated to take up to 10 years), AlphaOmega must secure enduring commitment from its financial partners.
- **Encouraging NGOs to embrace qualitative impact measurement:** It remains difficult to measure qualitative impact, and many associations show reluctance or difficulty in prioritizing this area. They frequently gather data without clearly defining the objective or necessary metrics, making it challenging to link data to desired social change.



Best Practices (Key Success Factors)

AlphaOmega's success factors stem from its pioneering venture philanthropy model and its methodology focused on sustained, integrated engagement:

- **Integrated package - Sizeable financing plus strategic accompaniment:** AlphaOmega's core "best practice" is its venture philanthropy approach, which intentionally combines multi-year, significant financial grants (up to €500,000 per year per association) with tailored strategic and operational guidance. This combination is deemed essential because, without the substantial funding, the associations would likely not be as receptive to the intensive structuring guidance, and without the structure, scaling is impossible regardless of the capital deployed.
- **10-Year time horizon:** Scaling an educational nonprofit is recognized as a very long journey. AlphaOmega adopts a long-term approach (at least 2–3 years, ideally up to 10 years), reflecting the philosophy that a strong incubator must support a limited number of structures over an extended period to ensure genuine, lasting impact.
- **Operational immersion and mutual trust:** AlphaOmega advisors work shoulder-to-shoulder with the NGOs, ensuring they are able to "descend to the operational level" and know the teams "by heart". This deep knowledge and consistent presence over time fosters the reciprocal trust necessary for effective collaboration. For instance, one investment director directly managed regional integration efforts during the merger between "100 000 entrepreneurs" and EPA.
- **Funding structural costs to anticipate growth**: The foundation emphasizes the critical need to finance structural development, an aspect often overlooked by associations. This proactive funding is aimed at bringing associations up to standard and anticipating potential blockages that rapid growth would inevitably create.
- **Focus on impact clarity and professionalization:** AlphaOmega ensures that partners clearly articulate their impact objectives (including the nature, volume, and territorial scope of beneficiaries). They also developed mandatory training modules focused on "selling," teaching associations the key mechanics of commercial engagement, such as prospect identification, qualification, and follow-up, alongside refining their macro-level discourse.
- **Mobilisation of external expertise:** The foundation facilitates the mobilization of skills sponsors (mécènes de compétences) to intervene on highly technical or major projects (e.g., digital, management, HR).

KEY RECOMMENDATION

> To truly scale an educational non profit organization, we must invest big, stay for the long haul and work shoulder to shoulder with its teams on data, structure and leadership. It is the blend of high expectations and deep trust that unlocks impact.
>
> — **Léo LAMBOULEY**, Investments Director, AlphaOmega

ASHOKA

Who we are?

Founded: 1980 (France: 2005)

Team: ~15 staff in France
(part of a global team in 95 countries)

Geographic area:
Global – present in 95 countries

Number of supported organizations / beneficiaries: Over 4,000 Fellows globally; 4–5 new Fellows selected annually in France

Themes & sectors supported:
Democracy, Education, Health, Food Systems

Focus on scaling: Core mission centers on scaling systemic social impact

About

To identify and support social entrepreneurs with systemic solutions that address root causes of societal issues and enable them to scale their impact sustainably and globally.

What we do?

- Lifetime support for Ashoka Fellows
- Intensive 3-year tailored support phase followed by long-term accompaniment
- Access to a global network of mentors, experts, funders and peers
- Pro bono partnerships with legal, financial and strategic advisory firms
- Expertise in international scaling, impact structuring and advocacy

Methodology

Ashoka applies a long-term, relationship-based model grounded in trust and systemic thinking. After a rigorous 12–18 month selection process, Fellows enter an intensive support phase combining:

- Strategic and organizational development
- Business model refinement and structuring
- Impact measurement and theory of change articulation
- Political advocacy and systems change
- International development strategy

Support is delivered by an ecosystem of sectoral experts, philanthropists and partner organizations. Fellows benefit from lifelong access to this community.

CHALLENGES & BEST PRACTICES

Challenges for Social Enterprises

- **Structuring viable and scalable business models:** Social enterprises often struggle to design business models that are both financially sustainable and scalable. Building a solid structure that supports long-term impact growth is a recurring challenge.
- **Addressing HR challenges tied to scaling:** Anticipating and managing human resources during growth is complex. Scaling requires careful planning to strengthen teams, attract new talent, and adapt management practices to evolving organizational needs.

• **Navigating complex legal and financial transformations for replication:** Replicating successful models in new contexts involves navigating legal and financial complexities. Ashoka helps entrepreneurs manage these transitions through pro bono partnerships with expert law and finance firms.

• **Expanding internationally while maintaining mission fidelity:** As social enterprises expand globally, maintaining alignment with their founding mission becomes critical. Ensuring that growth does not dilute their core purpose is a key challenge for Fellows scaling internationally.

Challenges for Ashoka in Supporting Scale

• **Highly individualized support limits the number of SEs supported annually:** Ashoka's approach is deeply personalized, offering intensive, long-term support. While this model ensures quality, it limits the number of Fellows who can receive full accompaniment each year (around four to five in France).

• **Growing demand for funding within a purely philanthropic model:** There is a rising demand for financial support from social entrepreneurs, yet Ashoka itself operates solely through private philanthropy. This dependence creates funding pressure for both Ashoka and its Fellows.

• **Absence of public subsidies increases dependency on private donors:** Without access to public subsidies, Ashoka remains fully reliant on private philanthropic contributions, which can limit flexibility and long-term planning.

Best Practices (Key Success Factors)

• **Lifelong strategic and operational support builds trust and capacity:** Ashoka's model of lifelong support helps Fellows develop both strategically and operationally. This long-term engagement builds deep trust and strengthens their ability to achieve lasting impact.

• **Global peer network fosters innovation and partnerships:** Ashoka Fellows benefit from access to an international network of peers, mentors, and experts. This community fosters collaboration, innovation, and cross-border partnerships that amplify impact.

• **Tailored mentoring from system-changers ensures relevance at every stage:** Mentoring and guidance are highly customized, delivered by seasoned changemakers and sector experts. This ensures support remains relevant and actionable throughout each phase of scaling.

• **Emphasis on systemic change expands impact beyond organizational growth:** Ashoka's focus on systemic change—tackling root causes rather than symptoms—extends impact well beyond the organization itself. By empowering entrepreneurs to transform systems, Ashoka ensures lasting, large-scale social change. Lifetime strategic and operational support builds deep trust and capacity.

KEY RECOMMENDATION

To support truly impactful scaling, we focus on systemic change and long-term support. It's not just about helping an entrepreneur grow an organization—it's about empowering them to transform systems, supported by a lifelong community.

— **Macha BINOT**, Ashoka France

CENTER FOR SOCIAL INNOVATION ZSI

Who we are?

Founded: 1990

Team: scientific institute, combining expertise in social innovation research, evaluation, and policy design

Geographic area:
Austria, with an European focus

Number of supported organizations / beneficiaries: currently working on around six projects focused on scaling

Themes & sectors supported:
Social innovation from a research and policy perspective. Mainly focused on social inclusion and poverty reduction; ecological social innovations are less represented

Focus on scaling:
Conceptual and research support for scaling has become a growing priority over the last 2–4 years

About

To be a scientific institute based in Austria focusing on social innovation from a research and policy perspective, aiming to make research useful and applicable to real-world challenges

What we do?

- Conceptual and research-based support for scaling social innovations.
- Developing practical guides to help understand and apply scaling concepts (such as the ESF+ SI Plus project).
- Mapping the broader ecosystem and emerging opportunities.
- Evaluating scaling processes of social innovations.
- Analyzing impact models, assessing the maturity of innovations, and providing conceptual guidance on scaling approaches.
- Facilitating dialogue between social innovators and public institutions.
- Acting as a "discussion starter" to demystify scaling and reduce associated fears.

Methodology

ZSI operates mainly on a project-based footing, with its support linked to publicly funded programs (EU and national ministries), rather than continuous or ad hoc support to social innovators.

The approach focuses on the sustainability of impact and knowledge management:

1. Conceptual Support: Developing scaling plans and providing guidance on "scaling pathways" (a combination of models adapted to the organization).

2. Knowledge Management: Emphasizing the importance of open and structured documentation of practices, processes, and tacit insights to ensure the approach can be replicated and sustained, particularly for smaller organizations.

3. Impact Analysis and Evaluation: Analyzing impact models and ensuring that implemented projects not only work but can also be scaled, thereby proving that the results are sustainable. Evaluating scaling processes and programmes supporting scaling social innovations in Austria.

4. Cooperation: Collaborating with intermediate bodies and ministries to encourage the integration of scaling from the pilot stages of projects.

CHALLENGES & BEST PRACTICES

Challenges for Social Enterprises

- **Access to funding:** Obtaining funding remains one of the main obstacles preventing social innovations from expanding their impact since the scaling phase is resource intensive.
- **Scaling is not yet an established concept:** The lack of clear understanding and recognition of the scaling concept creates uncertainty in the ecosystem.
- **Balancing day-to-day operations with major organizational changes required for scaling:** Organizations must manage both their regular activities and the complex structural and personnel adaptations required for expansion.
- **Growing expectation that innovations should operate without ongoing funding:** Social innovations face the growing expectation of operating and achieving sustainable impact without requiring continuous public funding, which is often challenging.

Challenges for Center for Social Innovation ZSI

- **Budget constraints and dependence on competitive funding:** The need to rely on competitive funding (EU or national) limits ZSI's ability to provide continuous or independent support to social innovators.
- **Ability to integrate scaling support only when aligned with funded projects' priorities:** Scaling support is only possible when it aligns with the objectives and priorities of the specific projects for which ZSI has secured funding.
- **Difficulty in following-up on the results of the support grated to social innovators:** Due to the project logic that is governing ZSI's activities it is difficult to assess the long-term results of support granted to social innovators.



Best Practices

- **Demystification of the scaling concept:** Demystifying scaling helps organizations understand that it is about supporting and prolonging existing impact rather than creating something entirely new, thus taking away the fear associated with the term
- **Importance of continuity to sustain long-term impact:** Emphasizing the continuity of support is crucial to ensure that positive impact lasts over time and is not limited to the duration of a pilot project
- **Structured knowledge management:** Open and structured documentation of knowledge (practices, processes) is essential to enable effective replication and sustainability of the approach, especially in small structures
- **Community learning:** Bringing different communities of the social innovation ecosystem together allows organizations to learn from mutual experiences and innovations to progress collectively
- **Proof of sustainability:** Ensuring that implemented projects are designed to be scalable proves the sustainability of the achieved results

KEY RECOMMENDATION

To guarantee sustainable impact, we must first address the fears associated with scaling, as it is not an entirely new concept, but the continuity and structuring of knowledge that enable us to consolidate and expand the impact of what is already working.

— **Barbara GLINSNER**, ZSI



FASE

Who we are?

Founded: 2013

Team: ~15 staff
plus a pool of senior consultants

Geographic area:
Europe – HQ in Germany,
operations EU-wide

Number of supported organizations / beneficiaries: 100+ transactions facilitated; >€85 million raised

Themes & sectors supported:
Generally all SDGs

Focus on scaling: Majority of activities dedicated to scaling via growth capital

About

To mobilise tailored, mission-aligned capital for high-impact enterprises across Europe, enabling them to scale proven social and environmental solutions sustainably.

What we do?

- End-to-end fundraising advisory (€300 k – €10 m+)
- Investor-readiness diagnostics & coaching
- Design of hybrid / blended-finance structures using catalytic capital
- Preparation of pitch deck, investment deck, financial model and process letter
- Database of 2 000+ impact investors and funds across Europe
- Coordination of outreach, management presentations, due-diligence and contract negotiation

Methodology

FASE applies a phased corporate-finance process blended with impact-investment expertise:

1. Preparation (8-12 weeks): strategy & impact review, financing-gap analysis, drafting core materials.
2. Investor Approach: curated long-list, teaser & NDA circulation, process letter.
3. Management Presentations: deep-dive sessions, data-room access, collection of non-binding offers.
4. Due Diligence & Negotiation: support on term sheet, legal & impact clauses, structuring blended solutions.
5. Closing & Follow-on: signing, disbursement, option for future rounds through FASE network.

Throughout, FASE acts as an independent broker aligning impact objectives with investor return expectations.

CHALLENGES & BEST PRACTICES

Challenges for Impact Ventures

• **Turning impact stories into investor-grade business cases:** Many social enterprises struggle to translate their social impact into strong, investor-ready business cases that can meet financial expectations while maintaining their mission focus.

• **Limited understanding of financing instruments:** Social entrepreneurs often lack familiarity with advanced financial tools such as convertible loans, mezzanine structures, or blended finance options, which could help them attract suitable investors.

• **Balancing impact integrity with financial returns:** Maintaining a strong social mission while meeting investor expectations for returns is a constant challenge. Impact-driven ventures must find a middle ground that satisfies both goals.

• **Resource constraints during due diligence:** The due diligence process can be lengthy and demanding. For small teams with limited time and capacity, this can stretch resources and delay progress toward securing investment.

Challenges for FASE

• **Fragmented EU impact-finance regulations:** Operating across multiple European countries means navigating diverse and sometimes inconsistent regulations, which complicates cross-border transactions and scaling efforts.

• **Finding mission-aligned investors for non-traditional models:** Many of the social enterprises FASE supports operate outside the typical venture-capital model. Identifying investors who understand and support these high-impact, mission-first ventures remains a major challenge.

• **Need for catalytic capital to de-risk innovative structures:** FASE often designs innovative hybrid and blended-finance solutions. To make these appealing to private investors, catalytic capital is essential to absorb risk and unlock additional funding.

• **Covering operational costs in a developing market:** As the impact finance market in Europe is still emerging, relying mainly on success fees from completed deals can make it difficult for FASE to cover its operating costs consistently.

• **Limited availability of early-stage financing:** Financing for startups—particularly those with social impact models—is still underdeveloped. FASE faces challenges during market slowdowns, when risk appetite among investors decreases further.

Best Practices

• **Flexible financing toolbox:** FASE uses a wide range of instruments—equity, debt, mezzanine, grants, and hybrid models—to design tailored financing solutions that meet each venture's specific needs.

• **Extensive proprietary investor network:** With a network of more than 2,000 impact investors across Europe, FASE can quickly identify and connect social enterprises with funders who align with their mission and financing needs.

• **Leveraging catalytic capital to attract private investment:** By strategically using catalytic capital, FASE helps de-risk transactions and unlock larger volumes of private investment toward high-impact ventures.

• **Clear, phased process for efficiency:** FASE follows a structured financing process—spanning preparation, investor outreach, presentations, and negotiations—that reduces friction, builds trust, and speeds up deal-making for all parties.

• **Integrating impact KPIs into deal terms:** Impact Key Performance Indicators (KPIs) are embedded directly into financing agreements, ensuring that social and financial objectives remain aligned throughout the partnership.

• **Deep in-house financial expertise:** FASE's internal team combines finance and impact experience, giving them a strong understanding of both investors' expectations and social enterprises' funding needs. This expertise allows them to structure the right deals for each venture.

KEY RECOMMENDATION

> Many social challenges are massively underfunded, and if you use catalytic solutions smartly, different types of investors can contribute.
>
> — **Markus FREIBURG**, CEO, FASE



IMPACT SHAKERS

Who we are?

Founded: 2018

Team: 8 staff membres
across different entities

Geographic area: Europe
incl. UK – fully remote distributed team

Number of supported organizations / beneficiaries: 8 investments per year via Impact Shakers Ventures, 10 companies backed over 2 years through the Microfund, 10 companies in Raise programme per year

Themes & sectors supported:
Climate Tech, Impact Infrastructure, Inclusion Tech

Focus on scaling:
100% of activities dedicated to scaling

About

Impact Shakers is a global impact ecosystem tackling societal and environmental challenges through inclusive entrepreneurship.

Our mission is to create impact at scale by evolving how we build businesses, for what purpose and who gets to build them.

What we do?

- Investment capital
- Capacity building programmes

Methodology

Impact Shakers blends classic start-up acceleration tools with impact-specific and founder-wellbeing approaches.

• Tools & resources: 360° diagnostics, systems mapping, IMP+ and Vested Impact due diligence, impact KPIs & road-maps; Impact Scaling Method (Lean-inspired); Impact Readiness Levels; mission-protecting impact term sheets; five-layer wellbeing value chain and a Wellbeing Clause in contracts.

• Support: a structured six-month accelerator for pre-seed / seed ventures ready for scaling, delivering holistic support across business growth, impact scaling and personal development.

• Distinctive edge: strong founder-wellbeing focus, diversity lens, bespoke support, and impact embedded from day 1.





CHALLENGES & BEST PRACTICES

Challenges for impact startups

- **Securing capital that values both impact and financial returns:** impact startups often struggle to attract investors who fully recognize and value their dual mission. They need funding partners who understand that social impact and financial performance go hand in hand.
- **Building balanced teams with business and impact expertise:** Creating teams that combine strong business acumen with deep impact knowledge is challenging. Many founders must bridge the gap between business skills and being missio driven in order to build sustainable, high-performing organizations.
- **Measuring and communicating impact while scaling:** As organizations grow, maintaining robust impact measurement and communication becomes harder. Impact startups must balance operational expansion with adequatereporting on their impact
- **Safeguarding founder wellbeing during rapid growth:** Rapid scaling often puts founders under intense pressure. Burnout, stress, and internal conflicts are common, making founder wellbeing a critical yet often overlooked success factor.
- **Navigating regulations not built for impact ventures:** Impact-driven businesses frequently face regulatory barriers, because they are building in a new paradigm.

Challenges for Impact Shakers

- **Fragmented European market complicates cross-border scaling:** Supporting impact startups across Europe is complex due to fragmented markets, varying legal systems, and cultural differences that slow down cross-border growth.
- **Limited availability of follow-on funding:** Accessing additional funding rounds remains difficult, especially for ventures led by underrepresented founders. Ensuring continuity of capital after the first investment stage is a key challenge.
- **Raising capital as emerging fund managers:** As anew player in a limited investment space, that of Impact venture capital, Impact Shakers faces the challenge of raising capital for its own impact funds.
- **Geopolitical climate shifting focus away from impact:** Current geopolitical tensions and increased focus on defense spending risk diverting attention and resources away from impact investing and social innovation.

Success conditions / strengths

• **Founder-centered approach focused on wellbeing and partnerships:** Impact Shakers places founders at the heart of its model. Support combines capital, coaching, and wellbeing measures — including a Wellbeing Clause in contracts — to foster balanced, resilient leadership.

• **Connecting entrepreneurs to a 500+ member impact ecosystem:** Entrepreneurs gain access to a wide network of over 500 impact actors, including investors, accelerators, and experts. This ecosystem enables knowledge sharing, co-investment, and easier access to follow-on funding.

• Operators-turned-investors with hands-on experience : The Impact Shakers team consists of startup operators who have become investors. Their first-hand experience allows them to provide practical, empathetic support to the entrepreneurs they back.

• **Embedding impact in the business model from day one:** Impact is integrated into the company's DNA through dedicated KPIs, impact management tools, and mission-protection clauses that align financial success with impact.

• **Tailored, individualized support:** Support is designed around each entrepreneur's specific needs rather than applying a one-size-fits-all approach. This flexibility ensures more relevant and effective outcomes.

• **Championing diverse founding teams:** Impact Shakers actively supports diverse founders — across gender, ethnicity, and background — unlocking underrepresented talent and fostering innovative, inclusive solutions to societal and environmental challenges.

KEY RECOMMENDATION

We believe that the wellbeing of founders is key to building successful impact businesses. We see it as our role is to provide holistic support—capital, embedding impact, personal growth—and to create an ecosystem where entrepreneurs can thrive. Only a balanced founder can create sustainable, systemic impact.

— **Yonca BRAECKMAN**, Founder & CEO Impact Shakers



REACH FOR CHANGE

REACH FOR CHANGE

Who we are?

Founded: 2010

Team: 56

Geographic area:
Local offices in multiple countries in Africa (Ghana, Ethiopia) and Europe (Latvia, Sweden) and additional program reach through partnerships across Europe.

Number of supported organizations / beneficiaries: Since Reach for Change was founded in 2010, it has reached more than 3 000 active and aspiring entrepreneurs driving societal change. In 2024 Reach for Change supported around 42 SEs in scaling their impact.

Themes & sectors supported:
Inequality, poverty, and climate change

Focus on scaling: Around 10% of all SEs in the portfolio take part in the Scaling Readiness Program

About

Reach for Change is a global non-profit unleashing the power of social entrepreneurs by providing them with the tools, knowledge, and connections that help them build sustainable ventures. And alongside our partners, we push for policies and structures that allow innovative solutions to see the light of day.

What we do?

- Non-repayable grants
- Capacity development services (group & one-to-one)
- Access to peer & expert networks
- Dedicated scaling-readiness programme for early-growth ventures
- Toolkits and AI-based research assistant

Methodology

Guided by the proprietary Development Tracker, Reach for Change designs a 18-month journey blending capacity development support, capital, and connections. Each venture gets a tailored support package delivered by internal experts and external scale consultants, with constant feedback loops between impact and business model.



CHALLENGES & BEST PRACTICES

Challenges for Social Enterprises

Social enterprises supported by Reach for Change frequently encounter the following obstacles during their scaling process:

- **Securing scaling finance:** Social enterprises struggle to find long-term funding that supports scaling. Despite strong results and impact measurement, the gap between available financing and the demand for scaling-specific capital remains a major issue.
- **Leadership transition:** As social enterprises grow, founders must shift from being hands-on leaders to managers of larger teams. This transition can be difficult, especially when it comes to recruiting, team building, and establishing effective systems for delegation and management.
- **Impact measurement:** Measuring impact is essential but often seen as complex and expensive. Many enterprises face challenges in moving beyond project-level results to implement a comprehensive system that tracks impact across all their activities.
- **Brand visibility and marketing:** Many enterprises struggle with visibility and marketing, making it harder to reach potential customers, investors, and partners. This often hinders their ability to scale effectively.
- **Mindset shift:** Transitioning from incremental growth to exponential scaling is a significant shift. Social enterprises may struggle to change their mindset and embrace the larger, more strategic vision required for scaling.

Challenges for Reach for Change in Supporting Scale

As a Social Economy Support Organization (SESO), Reach for Change encounters its own limitations in delivering its Scaling Readiness Program:

- **Designing a one-size-fits-all scaling program:** Creating a standardized scaling program is challenging because social enterprises vary greatly in terms of business models, scaling strategies, and sectors. While there has been progress, more tailored content for specific areas like governance and operations would enhance the program.
- **Building internal knowledge and generating insights:** Reach for Change operates in diverse contexts (e.g., Ethiopia vs. the Nordics), making it hard to draw generalized conclusions. More program iterations are needed to capture robust data and separate universal trends from locally specific ones.
- **Refining growth metrics for heterogeneous ventures:** While the metrics used to track growth (beneficiary reach, financial results, geographical footprint, and employee numbers) are useful, some social enterprises find them too simplistic for their needs. These metrics need to be more refined to provide deeper insights into growth and impact.

Best Practices (Key Success Factors)

Reach for Change's key success factors lie in its integrated approach and focused, sustained engagement:

• **Integrated, holistic support package:** The best outcomes come from combining capacity-building, capital support, and access to networks. These three elements work together to give social enterprises the tools they need to scale sustainably.

• **Highly practical, individualised support:** Social enterprises benefit most from hands-on, individualized support. Tailored guidance allows them to apply existing knowledge to new challenges and address specific issues (such as improving production or scaling marketing efforts) while managing day-to-day operations.

• **Parallel work on impact and business model:** The most successful enterprises work on both their social impact and business model simultaneously. This approach helps them find scalable solutions that balance both aspects and integrate feedback loops for continuous improvement.

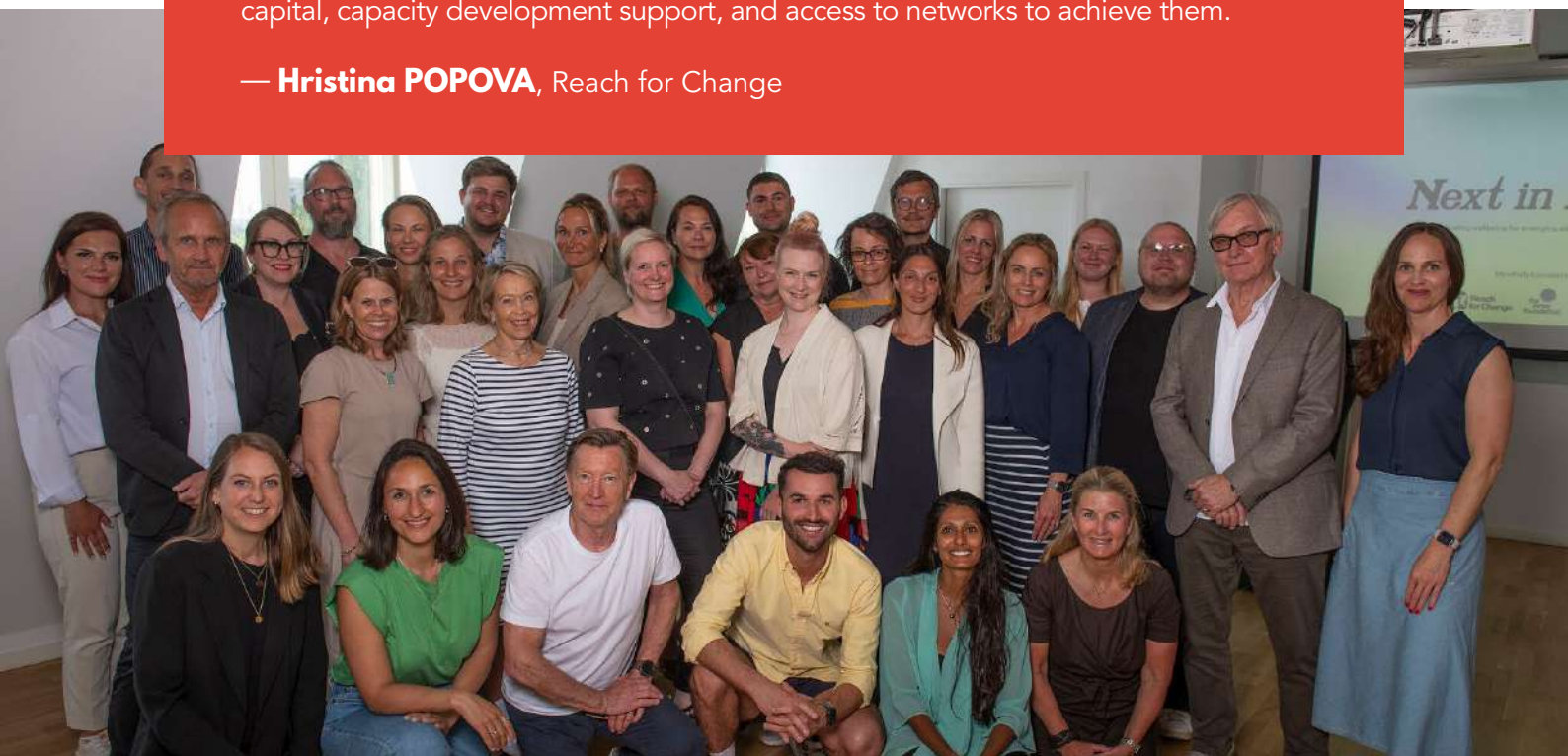
• **Leveraging a clear development framework:** Reach for Change uses a tool called the Development Tracker, which helps social enterprises assess their current organizational capacity and create a tailored roadmap for scaling. This structured framework supports resource allocation and tracks progress over time.

• **Multi-layered network access:** Social enterprises benefit from access to a diverse network that includes peers, experts, public institutions, and funders. This multi-tiered network helps them learn from others, create systems change, and secure funding opportunities.

• **Clear entry-level:** Setting clear criteria for selecting social enterprises ensures that those who enter the program are well-positioned for success. Social enterprises with founders who are open to feedback and willing to learn are more likely to succeed in scaling.

KEY RECOMMENDATION

> Significant impact demands a holistic approach to supporting entrepreneurship: the magic happens when you set clear and specific goals and leverage a combination of capital, capacity development support, and access to networks to achieve them.
>
> — **Hristina POPOVA**, Reach for Change



RETHINK IRELAND

Who we are?

Founded: 2016

Team: +50 staff

Geographic area: Ireland – national scope

Number of supported organizations / beneficiaries: Over 500 social innovations supported

Themes & sectors supported: Education, Equality (disability, minority groups), Green Transition, Health and Social Enterprises (cross-sectoral)

Focus on scaling: All their investments are combinations of cash grants and business supports, specifically targeted towards growing & scaling the social innovations supported.

About

To support the best social innovations so they can grow and maximise their impact across Ireland

What we do?

- Strategic and operational one-to-one consultancy
- Acceleration / capacity-building programmes and peer learning
- Access to networks and communities of practice
- Cash grants, social-finance opportunities, non-repayable loans
- Skill development (leadership, impact, fundraising, governance, etc.)

Methodology

Rethink Ireland operates a venture-philanthropy model pairing cash grants with access to a capacity building programme and tailored business support. The Organizational Health Assessment Tool is an internal tool used by Rethink Ireland to assess the position of the projects at the beginning and end of a fund, it aids the identification of capacity building supports needed by each organisation (e.g. impact management, strategy, financial resilience, innovation, scaling, and equality, diversity, inclusion). This feeds a bespoke capacity-building plan delivered between in-house expertise and by external consultants. Cash grants payments align with targets and goals associated with programme deliverable as well as strategic areas of growth. Rethink Ireland support the full lifecycle of social innovations, backing from early stage up to mature social innovations.





CHALLENGES & BEST PRACTICES

Challenges for Social Enterprises

Social enterprises supported by Rethink Ireland, which are only non-profits in Ireland, face several critical hurdles in their development:

- **Securing sustainable and long-term funding:** Many social enterprises struggle to access long-term, sustainable funding, especially in the non-profit sector. Despite demonstrating strong management and impact, securing the necessary capital for scaling remains a major obstacle, with public sector funding being particularly hard to obtain.
- **Market access:** Gaining access to markets and public procurement opportunities is often cited as a key challenge. Without these opportunities, it is difficult for social enterprises to expand their reach and scale effectively.
- **Sector fragility and talent retention:** The sector is perceived as fragile, and social enterprises often face difficulties in retaining talent, especially as expertise is often concentrated within the leadership team, leaving the rest of the organization vulnerable.
- **Measuring and managing Impact:** While impact measurement is crucial, it is often not well understood or implemented effectively. The challenge lies in turning impact data into actionable insights for improvement, rather than simply using it for reporting purposes.

Challenges for Rethink Ireland

- **Cross-fund learning with limited internal capacity:** Sharing learning across different funds and programmes is often difficult due to internal capacity constraints. However, a dedicated team has now been established to address this challenge and improve cross-fund learning.
- **Incomplete value propositions from applicants due to resource constraints:** Some applicants struggle to articulate a clear value proposition due to limited resources. This makes it harder for Rethink Ireland to understand their needs fully, impacting the design of the support program.
- **Power dynamics hindering open relationships with grantees:** as a funder, Rethink Ireland sometimes faces challenges in building authentic, trusting relationships with awardees. Social enterprises may fear that disclosing internal issues could jeopardize their funding, which can hinder open communication and effective support.

Best Practices

- **Strategic funding (multi-year cash grant + capacity-building):** A combination of multi-year cash grants and capacity-building support is essential for scaling. This approach helps social enterprises move from "survival mode" to long-term sustainability, with payments tied to specific impact and organisational goals.
- **Peer and network access as critical lever:** Peer learning and access to networks are vital for success. Social enterprises benefit from connecting with other organisations working on similar issues, as well as experts and potential funders.
- **Organisational Health Assessment Tool to tailor support:** Rethink Ireland uses this tool to assess the health of organisations at the start and end of each funding cycle. This helps identify capacity gaps in areas such as governance, scaling, and impact management, ensuring tailored support.
- Venture-philanthropy model combining cash and business supports: Rethink Ireland uses a venture-philanthropy model that combines financial grants with business support and access to social finance. This model provides comprehensive 360-degree support to ensure social enterprises grow sustainably.
- **Holistic sector coverage and stage-agnostic approach:** Rethink Ireland supports social enterprises at all stages of development, from early ideas to mature organisations with national impact. This flexible approach allows them to meet the needs of organisations at different stages of scaling.
- **Collaboration with other key ecosystem players:** Collaboration with other organisations, such as public institutions and experts, strengthens the social innovation ecosystem and helps social enterprises achieve their scaling goals.

KEY RECOMMENDATION

Scaling social innovation requires a strategic mix of capital, targeted capacity-building and access to networks, tailored to each organisation's stage of development to enable them to focus on the right challenge at the right time, driving financial resilience and lasting impact.

— **Mario VOTTERO**, Impact Director



SCALE CHANGER

Who we are?

Founded: 2014

Team: 9 senior staff with complementary expertise (77% women)

Geographic area: 40 countries (France, Europe, Africa, Latin America)

Number of supported organizations / beneficiaries: Over 3 200 organisations supported since inception

Themes & sectors supported: Cross-sector support provided to impact-driven organisations such as social enterprises and associations, NGOs, private and public funders, SESOs

Focus on scaling: 100% of activities dedicated to scaling and consolidation

About

We equip organisations with the strategies, tools and capacities they need to scale proven solutions and maximise their social and environmental impact. We also collaborate and build the capacities of support organisations so that the environment is more conducive for social innovations to scale.

What we do?

- Tailored strategic and operational support missions (3 to 40 consultant days)
- Collective capacity-building formats: design and facilitation of scaling-related modules within acceleration or training programmes
- Open-access resources: Scale Me Up 360° self-assessment tool, guidebooks, toolkits, case-studies

Methodology

ScaleChanger blends proven tools, facilitation methods and curated resources across five key components of scaling: strategic diagnosis, impact modelling, business model, organisational transformations and governance.

Tools & resources applied:

- Strategic-diagnosis canvas, Theory-of-Change mapping template
- Business-model scenarios and financial dash-boards
- Scaling roadmap templates and readiness checklists
- Online maturity tests

Facilitation methods:

- Collective workshops, webinars and peer-to-peer co-development sessions
- Flash clinics, mentoring
- Iterative coaching with deliverables that serve as strategic compasses

All tools are field-tested and adapted to each organisation's maturity and context, ensuring pragmatic, actionable outputs.

CHALLENGES & BEST PRACTICES

Main challenges for Social Enterprises

- **Complex internal transformation and significant funding needs when scaling:** expanding proven solutions requires significant internal adaptations and substantial financial resources.
- **Navigating fragmented support ecosystems and funding landscapes:** it is difficult for organisations to find appropriate support and necessary funding in scattered and uncoordinated environments.
- **Maintaining the mission focus while professionalising operations:** growth and professionalisation

Main challenges for ScaleChanger

- **Mobilising long-term resources to provide deep, bespoke support:** quality and personalised support require stable and continuous resources, which are difficult to secure in the long-term.
- **Building multi-stakeholder coalitions to address systemic barriers:** It is essential to coordinate various actors (multi-stakeholders) to effectively address problems requiring system-wide change.
- **Balancing customisation with the need for scalable, replicable tools:** We must find the right balance between adapting tools to each specific context and creating standardized tools that can be used by a large number of organisations.

Best Practices

- **Co-building each mission with the client for contextual relevance:** ScaleChanger fosters co-construction to ensure that the solution provided is perfectly adapted and relevant to the client's unique context.
- **Flexible support duration aligned with organisational pace:** This principle ensures that support meets the time needed for each organisation to evolve and implement changes, as there is no one-size-fits-all recipe for scaling
- **Peer-learning spaces that foster collective intelligence and mutual aid:** These spaces allow organisations to share their experiences, benefit from collective wisdom and advice while obtaining valuable insights to solve their problems.
- **Strong focus on measurable impact and concrete implementation:** It is important to focus on tangible and measurable impact so that support efforts translate into concrete and verifiable results on the ground.
- **Continuous improvement of tools through field feedback:** This process ensures that ScaleChanger's tools remain relevant, effective, and adapted to the operational realities of the beneficiaries, as they are field-tested and continuously improved.

KEY RECOMMENDATION

> There is no one-size-fits-all recipe for scaling. Effective support is built on active listening, co-creation and the transfer of proven, adaptable tools—empowering changemakers to drive their own growth.
>
> — **Isabelle HOYAUX**, Founder & CEO, ScaleChanger

SOCIAL INNOVATION FACTORY

Who we are?

Founded: 2013

Team: 9 people

Geographic area: Flanders & Brussels (BE) with international links

Number of supported organizations / beneficiaries: 140 organisations supported yearly (≈70 at scaling stage)

Themes & sectors supported: broad range of societal challenges (poverty, inclusion, climate, mental health, etc.)

Focus on scaling: 50%

About

To support social and environmental impact organisations by connecting them with the right experts, tools and networks, keeping services accessible and focusing on scaling impact rather than organisational growth.

What we do?

- Free 20-minute "Impact Cabinet" consultations
- Thematic masterclasses (policy influence, impact storytelling, governance)
- "Scalers Club" – bespoke peer-learning programme for 8 participants
- Monthly in-person meet-ups (~30 participants per month)
- 'Finance your Social Enterprise' advisory board (monthly pitch session)
- Biannual "Acceleration Days" – 20-minute expert speed-dating for ca 60 scalers
- Access to an extensive facilitator network and online toolkits
- System Shakers (annual conference gathering 200+ participants)

Methodology

SIF deploys a highly flexible, needs-driven approach. Entrepreneurs are matched immediately with the right experts and peers; individual sessions are combined with collective learning (masterclasses, Scalers Club). Needs are assessed via application forms and intake calls. The organisation invests heavily in maintaining a wide ecosystem of pro-bono experts. Impact first: scaling may mean policy change or replication, not only organisational growth.

Tools & Resources

Tools

- Impact Track (enhanced impact-measurement tool)
- Business Model Canvas
- socialeinnovatieatelier.be e-learning platform
- Inner Development Goals tools
- Legacy Canvas

Methods

- Impact Cabinet
- 'Finance your Social Enterprise' advisory board
- Acceleration Days
- Scalers Club peer-learning
- Masterclasses & workshops
- Needs assessment via forms and intake calls
- Monthly meet-ups
- System Shakers (annual conference gathering 200+ participants)

Resources

- Large pro-bono expert network (finance, legal, etc.)
- Links to philanthropies, governments, corporates, universities



CHALLENGES & BEST PRACTICES

Challenges for Social Enterprises

Social enterprises in Flanders and Brussels face several key challenges when scaling:

- **Finding the right funding for each growth stage:** The main challenge is securing the right money for the specific growth stage. Finding the suitable capital type, not just securing funding, is the issue.
- **Preparing the team for scale (HR, co-leadership):** Scaling requires the full team to be prepared, not just the founders. Internal challenges related to HR management, co-management, and co-leadership must be addressed to ensure smooth scaling.
- **Mission-first models misunderstood by traditional finance:** Traditional financial systems, like banks, often fail to understand mission-driven models. Social enterprises must constantly explain that their primary focus is on mission and impact, not profit maximization.
- **Barriers from legacy economy favouring competition over impact:** The dominant legacy economy tends to prioritize competition over collaboration, making it harder for social enterprises to foster partnerships that focus on impact rather than profit.

Challenges for SIF

- **Highly diverse participant needs call for constant customisation:** The needs of social enterprises vary widely, which requires constant customization of support. SIF invests a lot of time in one-on-one coaching to ensure that each enterprise gets the right guidance at the right time.
- **Lack of in-house legal and lobbying expertise:** SIF lacks specialized in-house legal and lobbying expertise, often relying on external consultants. However, this creates a delay in responding to the frequent legal and regulatory questions from social enterprises.
- **Non-structural annual funding creates uncertainty:** SIF's core funding, which is provided annually by the government (around €500k), is not guaranteed. The need to apply for funding every year creates uncertainty and limits the organization's ability to plan long-term. Aside of this government funding there is a mix of other financial revenues, coming from very diverse angles all requiring specific KPI's, visibility etc.

Best Practices

- **Human-centered personalised support:** SIF tailors its support to the specific needs of each enterprise, providing quick access to expert and peers networks. This approach ensures that entrepreneurs receive immediate help, addressing their urgency and impatience.
- **Proven tools (Acceleration Days, Scalers Club):** These events are an effective best practice where 20-minute rotating consultations take place between experts and entrepreneurs. The format is highly structured, ensuring that all participants gain actionable advice. The Scalers Club is a bespoke peer-learning program that brings together eight social enterprises at a similar stage of scaling. Small groups foster a positive dynamic and create valuable learning experiences.
- **Extensive enablers network with lived experience:** SIF invests heavily in maintaining a vast network of pro bono experts. Building trust within this network is key to removing barriers and providing entrepreneurs with the resources they need to succeed.
- **Impact-first focus including policy work:** SIF prioritizes impact in all its initiatives, even if it means focusing on policy change and advocacy work. By inspiring social enterprises to consider scaling through systems change, SIF helps them "scale deep" rather than just focusing on organizational growth.
- **Preference for experts who have founded social ventures themselves:** SIF prefers to work with experts who have first-hand experience as founders of social ventures. This ensures that the advice given is grounded in real-world experience.

KEY RECOMMENDATION

Supporting social entrepreneurs must be deeply personalised and plugged into an ecosystem of practitioners who truly understand the field. Our role is to connect peers, open the right doors and keep impact at the centre—even if that means scaling through policy change rather than just organisational growth.

— **Kaat PEETERS**, Managing Director



UP SOCIAL

UP↗SOCIAL

Who we are?

Founded: 2010

Team: Core team of partners & consultants (≈10 staff)

Geographic area:
Spain (primary) – projects across Latin America & wider Europe

Number of supported organizations / beneficiaries: 50+ innovation ecosystems facilitated; indirect support to hundreds of social entrepreneurs

Themes & sectors supported:
Inclusive entrepreneurship, public services innovation, education, health, employment

Focus on scaling: Scaling is embedded in 100 % of projects (scaling out, up & deep)

About

To accelerate systemic solutions by adapting and scaling proven social innovations through rigorous methodology, multi-stakeholder engagement and evidence-based knowledge transfer.

What we do?

- Social Lab methodology to design and run scalable pilots
- 5-variable diagnostic framework (impact evidence, adaptation capacity, transfer model, income strategy, innovation type)
- Stakeholder mapping and coalition-building with governments, foundations and investors
- Facilitation of knowledge transfer between innovation 'senders' and local 'receivers'
- Training and advisory for SESOs and public agencies on designing for scale

Methodology

UpSocial combines three complementary strategies—scaling out (organizational growth), scaling up (policy & institutional adoption) and scaling deep (cultural change). Typical process:

1. Identify proven innovations worldwide with strong evidence of impact.
2. Assess fit using the 5-variable framework and select high-potential solutions.
3. Convene Social Lab with key stakeholders to co-design a pilot tailored to the local context.
4. Facilitate knowledge transfer between originator and adopter, aligning incentives and capabilities.
5. Pilot the solution with clear scale-up pathways, impact metrics and funding model.
6. Support replication or policy integration, monitor systemic outcomes, iterate.

Throughout the journey, UpSocial emphasises evidence, stakeholder ownership and designing for scalability from day one, ensuring pilots can transition to sustainable, large-scale solutions.

CHALLENGES & BEST PRACTICES

Challenges for Social Enterprises

• **Converting successful pilots into scalable, fundable models:** Many social enterprises find it difficult to transform a successful pilot into a robust, scalable model. Pilots often lack the structural and financial assumptions needed to attract long-term investment and support.

• **Securing aligned funding beyond the pilot phase:** After proving their concept, social enterprises often struggle to secure sustainable funding. They must focus on strengthening the value of their solution to attract investors and partners whose goals align with their mission.

• **Adapting solutions across geographies and cultures:** Scaling solutions internationally involves complex adaptation work. Each new geography or cultural context requires adjustments to governance, partnerships, and implementation strategies.

• **Finding local champions to drive replication:** Replication depends on identifying committed local actors who can adopt and lead the model in their own context. Finding such champions remains one of the biggest barriers to scaling.

• **Short political cycles and shifting public-sector priorities:** When scaling involves government adoption, political cycles can disrupt continuity. Frequent policy changes and shifting priorities make it difficult to maintain long-term stability for social innovations.Converting successful pilots into scalable, fundable models

Challenges for UpSocial

• **Aligning incentives between innovators and adopters:** Knowledge transfer is complex and relies on the motivation of both the original innovators and the local adopters. Ensuring that their interests and incentives are fully aligned is often a challenge.

• **Maintaining stakeholder engagement during long policy processes:** UpSocial's work on systemic change involves slow, multi-actor processes. Keeping all stakeholders committed and coordinated throughout these extended timeframes requires constant effort.

• **Navigating bureaucratic hurdles in government partnerships:** Working with public-sector partners is essential for scaling, but administrative barriers and bureaucratic delays can slow down progress and implementation.

• **Financing facilitation and knowledge transfer at scale:** UpSocial faces its own funding challenges in covering the costs of facilitation, stakeholder coordination, and large-scale knowledge transfer—activities that are essential to making scaling possible.

Best Practices

- **Design pilots for scalability from the start:** Pilots are built with scalability in mind from day one. This includes setting clear impact metrics, defining pathways for scale-up, and identifying the resources needed for expansion.
- **Replicate proven solutions instead of reinventing new ones:** UpSocial's philosophy centers on scaling what already works. By focusing on the replication and adaptation of proven innovations, they accelerate impact and reduce inefficiencies.
- **Use evidence-based selection and diagnostic tools:** Rigorous evaluation methods, such as the five-variable diagnostic framework, help UpSocial identify innovations with strong evidence of impact and the potential for adaptation and scale.
- **Conduct in-depth stakeholder analysis:** Understanding who benefits most from a solution—the "biggest benefactor"—is key. UpSocial maps stakeholders to clarify value propositions and align interests around shared outcomes.
- **Apply Social Labs to co-create local adaptations:** Through Social Labs, UpSocial brings together stakeholders to co-design context-specific pilots. This collaborative approach fosters local ownership and long-term commitment to the scaled solution.

KEY RECOMMENDATION

Real impact comes from scaling what already works. Start with evidence, build a coalition, and design every pilot as the first step of a scalable journey.

— **Tomás KIDD**, Partner, UpSocial



ANNEX 2

RELATED RESOURCES AND PRACTICAL TOOLS

Here is a list of various resources that can help you learn more about or make progress on the different topics covered in this guide.

ASSESSMENT & DIAGNOSTICS

- Scale Me Up: Get a 360° scan of all the areas of your company's life cycle and identify your strengths as well as your areas of improvement. The approach we offer is inspired by classic financial due diligence tools. The results of this diagnosis will include personalised recommendations together with resources on the various topics addressed.
- Reach for Change's Toolkits Platform provides tools and resources to help social entrepreneurs and innovators to develop a sustainable social enterprise that can deliver social impact at scale. With clear milestones to work towards and concrete action points to implement along the way, the toolkits cover three main development areas: effective solutions, financial sustainability, and leadership & team. Register on the platform and visit the Scaling Readiness page to find key resources for each step of getting ready to scale.

SCALING ACROSS BORDERS

- Scaling across borders
- The internationalisation of Tony's Chocolonely:
  ► Part 1 ► Part 2

SCALING STRATEGIES

- Social franchise workbook (FR)
- Endgame
- Spring impact - Scaling impact tool

BUSINESS MODELLING

- The Business Model Canvas
- Strategyzer has many open sources modelling tools for growing businesses

IMPACT MEASUREMENT & COMMUNICATION

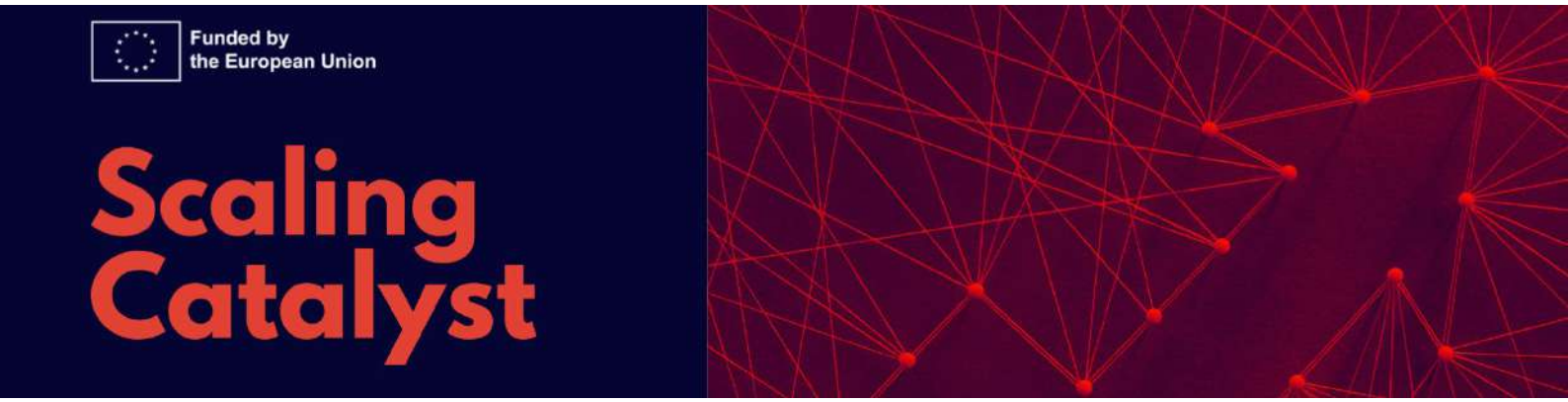
- 9 tools to plan and measure the impact
- Communicate your social impact
- Impact Europe

ALLIANCES AND NETWORKS

- Creating partnerships
- Finance and investment – a really good resource on what is needed to get SEs investment ready which is a frequent knowledge gap when an organization is just starting to think about how to work with scaling.

ANNEX 3

SELF ASSESSMENT TOOL FOR SESO BEFORE LAUNCHING A SCALING SUPPORT PROGRAME



This Self assessment tool is for Social Economy Support Organisation (SESOs) considering to offer a scaling support program to social entreprneurs (SEs).

This short questionnaire has 3 sections:

1| Your internal strengths

2| Your positionning in the ecosystem

3| The design of your scaling support program.

This tool was developped by the Scaling Catalyst consortium.

1 TELL US ABOUT THE STRENGTHS OF YOUR SESO

This section explores the strengths or your current value proposition and services as a SESO.

For each of the questions in this section, **rate 1** (weak) **to 5** (strong) according to the strengths and areas for improvement for your support organisation.

1.1 Is your SESO's vision/mission/theory of change or value proposition clear and understandable to all stakeholders?

1 2 3 4 5

Not — Very Clear

1.2 How long has SESO been in business?

1 2 3 4 5

Less than 2 years — Over 7 years

1.3 From the following list, how many services does your SESO offer to the organisations it supports:

- **one-to-one support and advice,**
- **mentoring,**
- **group training,**
- **individual distance/face-to-face training,**
- **access to finance for the growth of their business.**

1 2 3 4 5

One single service — **All 5**

1.4 Over the last 3 years, how would you rate the impact you have on supported Social Entreprises?

1 2 3 4 5

Not so obvious — **Very high impact, proven and visible**

1.5 Do you measure your impact and communicate about it through Key Performance Indicators?

1 2 3 4 5

No, we know how many social enterprises we have supported, but we don't really measure the impact of our support on their development. — **We regularly measure our impact on our KPIs and use these indicators to make decisions about our programmes.**

Internal capacity to support Social Entrepreneurs (SE)

In the following questions,

> **rate 1** if you have no internal human ressources or associated expert in the field of expertise;

> **rate 5** if you have a HR (permanent staff or associated expert) with over 10 years of experience.

Situations in-between (for instance junior expert with less experience, high level experts but difficult to mobilize for all your requirements...) are rated between 2 and 4.

1.6 Internally, can your SESO mobilize skills to advise SEs in the field of **Strategic diagnosis?**

By "Strategic diagnosis" we mean the structured analysis of an organization's internal and external environment to identify key issues and guide strategy.

1 2 3 4 5

No one — **Over 10 years experience**

1.7 Internally, can your SESO mobilize skills to advise SEs in the field of **Strategy & Planning?**

By "Strategy & Planning" we mean setting long-term goals, analyzing internal and external environments, and designing structured actions to achieve desired outcomes efficiently, aligning resources, priorities, and timelines toward a clear vision, mission, and ambitions.

1 2 3 4 5

No one — **Over 10 years experience**

1.8 Internally, can your SESO mobilize skills to advise SEs in the field of **Organisation?**

By "Organisation" we mean the process of improving an organization's structures, systems, skills, and strategies to enhance its effectiveness, resilience, and capacity to achieve its mission sustainably.

1 2 3 4 5

No one — **Over 10 years experience**

1.9 Internally, can your SESO mobilize skills to advise SEs in the field of **Business model**

By "Business model" we mean how an organization creates, delivers, and captures value. It outlines the core strategy, key activities, revenue streams, customer relationships, and cost structure driving sustainable success.

1 2 3 4 5

No one — Over 10 years experience

1.10 Internally, can your SESO mobilize skills to advise SEs in the field of **Sales & Marketing?**

By "Sales & Marketing" we mean promoting, selling, and distributing a product or service. Marketing creates awareness and demand, while sales converts interest into purchases through direct customer interaction.

1 2 3 4 5

No one — Over 10 years experience

1.11 Internally, can your SESO mobilize skills to advise SEs in the field of **Leadership & Governance?**

By "Leadership & Governance" we mean the processes, structures, and behaviors through which decisions are made, authority is exercised, and accountability ensured to guide, coordinate, and sustain an organization's mission and impact.

1 2 3 4 5

No one — Over 10 years experience

1.12 Internally, can your SESO mobilize skills to advise SEs in the field of **Financing / Fund-raising?**

By "Financing / Fund-raising" we mean managing money and securing resources to support an organization's goals: including budgeting, investment, and generating income through donations, grants, sponsorships, or other funding sources.

1 2 3 4 5

No one — Over 10 years experience

1.13 Internally, can your SESO mobilize skills to advise SEs in the field of **Measuring & Managing impact?**

By "Measuring & Managing Impact" we mean assessing the social or environmental change resulting from an organization's activities, using data to evaluate effectiveness, inform decisions, and enhance accountability.

1 2 3 4 5

No one — Over 10 years experience

Specific skills to support SEs in scaling up

1.14 Internally, can your SESO mobilize skills to advise SEs in the field of **Advise Social Entrepreneurs in choosing a scaling strategy?**

The scale-up strategy can be any of the following (non-exhaustive list): scale up, scale deep, scale out, social franchise, territorial spin-off, flexible spin-off, diversification, densification, system change, etc.

1 2 3 4 5

No one — Over 10 years experience

1.15 Internally, can your SESO mobilize skills to advise SEs in the field of **Advise SE on how to Work in networks, cooperations, and partnerships?**

1 2 3 4 5

No one — Over 10 years experience

1.16 Internally, can your SESO mobilize skills to advise SEs in the field of **Internationalisation?**

1 2 3 4 5

No one — Over 10 years experience

1.17 Do you have a roster or database of **external sector experts (eg: health, education, employment, tech...)** that you can mobilise in the areas of intervention of the SEs you support?

1 2 3 4 5

Unstructured network. We search for our network when we need to — Strong roster. We have a number of experts in all fields

1.18 Do you have **a roster or database of social entrepreneurs** who have scaled their impact successfully - who can describe their strategies or be involved in the support program?

1 2 3 4 5

Unstructured network. We search for our network when we need to — Strong roster. We have a number of experts in all fields

1.18 Do you have a roster or database of **funds (private / public), philantropic funders / investors** interested in investing in SEs that are scaling up or funders interested in financing the scaling up of social innovations? In-country or at international level?

1 2 3 4 5

Unstructured network. We search for our network when we need to — Strong roster. We have a number of experts in all fields

1 TOTAL CURRENT STRENGHTS

Add up the total score of all questions in this section and check your results below.

Total over 70	You have a strong established SESO and already many strengths. Take a few minutes to review the areas that you would wish to improve and move to the second block: Positionning.
Total between 36 and 70	Your SESO is already established, with some strengths. It is time to start thinking on post-incubation or acceleration. Maybe seek expert advice to lauch your first scale up support program.
Total below 36	Consider strengthening or consolidating some of your current programs before adding a new component.

2 TELL US ABOUT YOUR POSITIONING IN THE ECOSYSTEM

This section of the tool explores how you would position your scaling support program in your environment or ecosystem.

2.1 How mature is your ecosystem when it comes to supporting entrepreneurship in general?

1 2 3 4 5

1: In its infancy - the SSE is barely recognised as an important economic and social sector. Few SEs are born each year

5: Advanced: numerous support programmes, many SEs created each year.

2.2 How easy is it to recruit SEs who are scaling up: are there many in the environment?

1 2 3 4 5

1: Very few SE are scaling. We know of less than 5 every year

5: Numerous scaling SE. There are numerous SE in incubation, consolidation, and at scaling stage

2.3 How would you rate your knowledge of the problems encountered by SEs seeking to change scale?

1 2 3 4 5

1: We are aware of some of the problems encountered by SEs wishing to change scale, but we do not know which are the most common, or the most crucial.

5: We have a clear idea of the problems faced by SEs looking to scale up. We know which problems are the most important to solve and in what order.

2.4 How do we assess scale readiness or maturity of SE?

1 2 3 4 5

1: We carry out a traditional strategic diagnosis and use the Business Model Canvas

5: We have developed tools to assess scaling readiness and are improving them from time to time.

2.5 Are you aware of other support programmes for scaling up in your country or region? who do they target? what do they offer (in terms of training, support, educational resources)?

1 2 3 4 5

1: We don't know the competition

5: We have a clear idea of what other programs offer and who they target

2.6 Are you aware of the support solutions available to SE willing to scale? What are their advantages and limitations?

1 2 3 4 5

1: We do not know what support programmes exist for SE willing to scale

5: We have a good knowledge of existing support to scale / acceleration programmes: we can name several and explain their specific features in terms of target, method, duration, cost, etc. We also know their strengths and limitations.

2.7 What would you offer that is additional to or different from existing scaling support programmes?

1 2 3 4 5

We would offer the same services for the same SEs as our competitors.

We know what we want to do differently from our competitors. We offer either services or a combination of different services, and this is easily identifiable by SEs and partners.

2.8 From the SE point of view, would your scaling support program be complementary with your current programmes?

1 2 3 4 5

We don't have a programme yet. The SEs in our network are not interested in changing scale or are not yet mature enough.

The link between our current support programmes/ services and a programme to support change of scale is clear, both for the SEs and for external partners.

2.9 From your point of view, would your scaling support program be in synergy with your current programmes?

1 2 3 4 5

There is no synergy between our current programmes and this new programme/service to support change of scale. We would have to mobilise entire new ressources

Certain internal resources could be pooled with other programmes (support function, HR specialised in support)

2.10 Are there opportunities for collaboration with other scaling support programmes?

1 2 3 4 5

We are not aware of any other programmes or services to support scale change

We have already identified and entered into partnerships with a number of scale-up programmes, and we are clear about our complementarities or points of competition.

2 TOTAL POSITIONNING

Add up the total score of all questions in this section and check your results below.

Total over 45	You already have a clear positionning in the environment. You know your target and you know clearly what services you will offer that they cannot find in the current environment.
Total between 20 and 45	You have already designed part of your services- however more design work seems necessary to reach a clear value proposition, relevant in your environment, for scaling social enterprises
Total below 20	Explore the environment and spend some time designing your scaling support program in response to observed gaps.

3 TELL US ABOUT THE DESIGN OF YOUR SUPPORT PROGRAM

This third and last section deals with the design of your scaling support program.

In the following questions:
> **rate 5** if the design of your scaling support program is clear or your capacity established in the field;
> **rate 1** if your design is yet to be formulated or your capacity low/untested in the field.

3.1 How many SEs do you want to support and what problem(s) will you help them solve?

1 2 3 4 5

We have no idea how many SE we are targeting or how many we are able to support.

We have identified a target number of SEs in line with our capabilities (HR, organisation, financing) and our market (potential SEs to target).

3.2 Identification / sourcing: how will you attract the right entrepreneurial profiles?

1 2 3 4 5

We have never identified a SE in a phase of change of scale and do not know where to start.

We already have a variety of channels (advertising, partnerships with other organisations, competitions or selection processes through EOI or applications) that bring us a sufficient number of customers/SEs.

3.3 Will you be targeting individual entrepreneurs or the management teams of a social enterprise? What are the implications of this choice?

1 2 3 4 5

We have not yet decided who to target

We have decided who to target and we know how to adapt our content to founders or management teams.

3.4 Have you set a clear, measurable and achievable objective to your program?

1 2 3 4 5

We have not defined a clear objective for our support.

We have defined a very clear objective for our support, and its achievement is measurable and measured.

3.5 Have you clearly defined your methodology? what will the relationship between your SESO and supported SE?

1 2 3 4 5

Not defined yet

Very clearly defined and understood both by our SESO staff and the SE

3.6 What will be the frequency of interactions between you, the SESO, and the SE?

1 2 3 4 5
Not defined yet — Very clearly defined

3.7 Have you established the working methods and tools to be used?

1 2 3 4 5
Not designed yet — Clearly designed

3.8 Have you established the mix between individual and collective approaches? The size and frequency of cohorts?

1 2 3 4 5
Not designed yet — Clearly designed

3.9 Have you established the mix between theory and practical application by the SE?

1 2 3 4 5
Not designed yet — Clearly designed

3.10 What is your capacity to put SE in touch with other Social Entrepreneurs?

1 2 3 4 5
No capacity — High capacity

3.11 What is your capacity to offer training: in e-learning (asynchronous)?

1 2 3 4 5
No capacity — High capacity

3.12 What is your capacity to offer individual mentoring?

1 2 3 4 5
No capacity — High capacity

3.13 What is your capacity to offer online webinars (synchronous)?

1 2 3 4 5
No capacity — High capacity

3.14 What is your capacity to offer group face to face training?

1 2 3 4 5
No capacity — High capacity

3.15 What is your capacity to mobilise a network of investors or financiers suited to the target /maturity of the targeted SEs?

1 2 3 4 5
No capacity — High capacity

3.16 Monitoring during the programme: which indicators will you measure? which data will you collect and how will you analyse them?

1 2 3 4 5

1: No indicators set yet

5: Indicators and data collection & analysis all set up

3.17 Impact assessment on the SEs supported: at which frequency will you assess the impact? For which timeframe? Which assessment methods will you use?

1 2 3 4 5

1: Not set yet

5: Impact measurement all set (indicators, data, collection)

3.18 Have you set up a monitoring system for support managers to advise / guide / listen to them?

1 2 3 4 5

1: No system

5: Clearly established system

3.19 Have you decided how you will identify learnings and share them within your team?

1 2 3 4 5

1: No system

5: Learning system clearly established

3.20 Busines model of your scaling program: can you estimate the cost per contractor or per cohort of contractors?

1 2 3 4 5

1: No idea of the costs

5: Costs clearly identified and assessed

3.21 Busines model of your scaling program: who would fund the proposed scale-up support services? For what %?

1 2 3 4 5

1: You have no identified source of revenue or funding

5: Ressources identified to cover 100% of planned costs

3 TOTAL DESIGN

Add up the total score of all questions in this section and check your results below.

Total over 100	Your value proposition is already well defined, you know your target and how to cater to their scaling support needs.
Total between 50 and 100	Based on your observations of the needs of the scaling SE and the gaps in the environment, take the time to design a strong value proposition.
Total below 50	Use the blocks where you gave yourself the lowest grades to focus in priority your energy: strengthen those areas of the design first

REACH FOR CHANGE

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