



**SOCIAL
ENTERPRISE
SCOTLAND**

STATE OF THE SECTOR

Covid-19 and Social Enterprise in Scotland

Social Enterprise Scotland - August 2020

  Social Enterprise Scotland  @SocEntScot

Social Enterprise Scotland is an independent, Scottish, membership-led organisation, built and governed by social enterprises. We're the first point of contact for the media and public and promote a positive vision for social enterprise.

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**SCOTLAND'S
SOCIAL ENTERPRISE
STRATEGY**

Supporting Scotland's Social
Enterprise Strategy 2016-26

BACKGROUND AND CONTEXT

This report has been prepared by Social Enterprise Scotland to provide an update to aid and inform the Scottish Government in considering next steps regarding recovery from Covid-19.

It builds on research undertaken by the Scottish Charity Regulator (OSCR) at the end of May 2020 where 25,000 registered organisations were surveyed. Over 5,000 replied, of which 774 are social enterprises, choosing a registered charity as their legal structure.

In Scotland there are 6,025 social enterprises in total, of which 72% are registered charities. The data from responses by the 774 social enterprises to OSCR was released to Social Enterprise Scotland in August 2020, and serves as the basis of this report.

Given the data is limited to those organisations with charitable status, Social Enterprise Scotland has also taken steps to gather intelligence from our Community Interest Company (CIC) members too.

With 884 CICs listed in the 2019 census and the context that they are the fastest growing part of the sector (60% increase since 2017), it was important for us to understand the CIC perspective to inform the initial data insights available.

While Social Enterprise Scotland does not have the same resource capacity as OSCR to undertake a similar survey with registered CICs, we have added commentary based on our understanding of the sector and our conversations with a small sample of our CIC members. While aware this sample is limited and may not be as statistically relevant, we feel it is important to add to the context in which they operate and better understand the impact on them at these challenging times.

While, as with all other sectors and industries, we would of course wish to ensure all organisations involved in social enterprise activity can survive this crisis, we are aware that there will be organisations that simply cannot recover from the devastating impact of Covid-19 on their business activity. We are aware resources are finite and our intention is to advise the Scottish Government to deploy resources available to maximise their effectiveness and impact in the support and recovery of the sector.



Social Enterprise Scotland is a membership organisation that connects, supports and promotes social enterprise.

INTRODUCTION

On 18 March 2020, the Cabinet Secretary for Communities and Local Government, Aileen Campbell, made a *speech about Supporting Communities* and the funding that would back these efforts. This set the tone for further actions and interventions:

“And I want to be clear to the chamber – to the citizens of Scotland – that our actions will be guided by doing all that we can to protect the health, welfare and wellbeing of the people of Scotland.”

At the end of July 2020, the *Advisory Board on Social Renewal* also heard:

There was also a view that some issues can be **even more acute for people living in rural areas**. “Take the urban problems and multiply them by ten for the rural areas! Food, fuel, transportation poverty, it all feels impossible”.

As noted in our recent submission on economic recovery, we believe the social enterprise sector can play a critical role in the future of both our economy and our communities and, as such, will themselves work to protect the health, welfare and wellbeing of the people of Scotland too.

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Data outline

A full list of the questions asked in the *OSCR survey* is given in the appendices of this document. For the purpose of this report, we have focused on key information we felt was relevant to the context of operations of social enterprises, adding in additional commentary and analysis as appropriate. We are aware that this data will also sit alongside intelligence gained through applications to the Third Sector Resilience Fund and through representation and conversation with other members of the social enterprise ecosystem.

GEOGRAPHICAL ANALYSIS

Highlands and Islands

23% respondents in the survey, 179 responses to the financial resilience question
32% face critical financial threat in the next 12 months
58% face some financial threat in the next 12 months
8% face no financial threat in the next 12 months

Glasgow and West

14% respondents in the survey, 80 Glasgow + 34 West
35% (G) and 18% (W) face critical financial threat in the next 12 months
60% (G) and 71% (W) face some financial threat in the next 12 months
1% (G) and 6% (W) face no financial threat in the next 12 months

Mid Scotland and Fife

14% respondents in the survey, 106 responses
25% face critical financial threat in the next 12 months
69% face some financial threat in the next 12 months
5% face no financial threat in the next 12 months

North East

13% respondents in the survey, 101 responses
27% face critical financial threat in the next 12 months
64% face some financial threat in the next 12 months
6% face no financial threat in the next 12 months

Central and Lothians

18% respondents in the survey, 96 Central + 43 Lothians
42% (C) and 33% (L) face critical financial threat in the next 12 months
51% (C) and 55% (L) face some financial threat in the next 12 months
7% (C) and 6% (L) face no financial threat in the next 12 months

South of Scotland

18% respondents in the survey, 134 responses
27% face critical financial threat in the next 12 months
60% face some financial threat in the next 12 months
10% face no financial threat in the next 12 months

Please note: Data for all the regions in the survey adds up to 100% when including those who were 'unsure.' It is worth noting that while each Scottish region had a broadly fair representation in the survey, certain local authority areas had lower returns, though this is in line with census statistics in the most part. These local authority areas were Inverclyde, West Lothian, West Dunbartonshire, South Ayrshire, Renfrewshire, Orkney, North Lanarkshire, Western Isles, Midlothian, Falkirk, East Renfrewshire, East Dunbartonshire, East Ayrshire and Clackmannanshire.



FINANCIAL ANALYSIS

To provide further financial analysis, we note that 310 social enterprise organisations (40%) engage in trading activities. Based on the research undertaken in our earlier “Covid-19 and the impact on Social Enterprise in Scotland “ report shared in April 2020, we are aware that those who were more reliant on trading income rather than grants or local authority contracts saw a reduction in income the most quickly.

This is backed up by data in the OSCR report where 53% noted a loss of income from fundraising but the data jumps to 70% in relation to a loss of income from other sources. Further analysis with our small sample of CICs reveals one organisation reporting income was now at just 20% of their usual monthly levels.

Furthermore, the data available on loss of income from trading jumps to 83% for those who have been operational for less than a year, making them particularly vulnerable.

Financial threat

- 232 (30%) of the organisations noted they faced a critical financial threat in the next 12 months (25% of them were from the Highlands and Islands);
- 468 (60%) faced some threat: 50 (6%) no threat and 24 (3%) were unsure.
- When comparing this to the full OSCR data set not just the social enterprise figures, we note that 967 (20%) face critical threat, 3118 (65%) face some threat, 540 (11%) no threat and 202 (4%) are unsure.

Financial viability

The survey asked different questions relating to financial viability based on 3, 6 and 12-month projections. It's clear that projections are harder to make as time periods extend but we can note that:

- Moving forward the survey reports that in the next 6 months, 34% of organisations see a “critical” or “large” threat to their financial viability; 46% see a modest or small threat and 12% no threat or unsure. 8% of the organisations highlighted that financial viability was critical before 3 months.
- If we project ourselves further ahead, looking at the 12-month financial viability then 45% of the organisations report a critical or large impact on financial viability; 30% report a modest or small impact and 15% share that their financial situation is going to be critical before 6 months.

When looking at reserves in relation to operating costs, the Third Sector Resilience Fund (TSRF) application data also suggested that at best, 30% of applicants had cash sufficient for one month of expenditure costs; 20% of applicants had cash sufficient for only two weeks of expenditure costs at the time of application to the TSRF, and 49% had sufficient cash to continue operating for longer than three months.

As these were the earliest charities to apply for the Third Sector Resilience Fund, it is likely that they are the least financially resilient organisations in the sector.

The Social Enterprise Census 2019 data highlights that on average, social enterprises had enough reserves to survive 7.5 months (33 weeks), although there is a high degree of variation between different social enterprises.

Other data regarding sector finances, taken from the 2019 Census, as highlighted in our previous report, may also be useful to remember:

- 62% of the sector receives 50% or more of its income through trading, though this includes local authority contracting, and for those operating public sector contracts, guidance was offered by the Scottish Government to consider contract obligations. As with funding, we anticipate organisations may be affected by potential public spending cuts into the future even if immediate negative effects have been avoided.
- Different sectors have different levels of trading – e.g. the median income for community halls is £15.5K, while for housing it is £3M.
- The Staff: other cost ratio is 49.4% - what does this mean for the tapering of furlough and meeting ongoing organisational and staff costs?
- Of the £4.4Bn total annual income, only 20% is grant funding and £3.1Bn comes from trading – including Service Level Agreements (SLAs) and contracts. As a result, we expect this will have had a different effect on organisations working with the public sector where contracts have still been honoured at the moment.

ORGANISATIONAL TYPE

The Social Enterprise sector is diverse, covers a variety of sectors and, as such, the effect of Covid-19 on their activity will vary. The notes below try to consider key issues and points raised for these different sector groups, based on both data and sector knowledge as known. These build on our initial comments from *the report Social Enterprise Scotland produced back in April*.

- **Community centres and halls** (1,005, 17% in the SE Census) – While some community venues have provided a key role in coordinating local Covid-19 responses, they are still challenged as organisations that use, and pay to use them, and are reluctant or prevented from using the space at present. This income will be critical to ongoing maintenance and bills and is often noted in relation to asset transfer proposals or purchase of assets for the community.
- **The arts/creative industry** (816, 14% in the SE Census) – More arts organisations, proportionately, have returned the OSCR survey, with 32% of responses. With many arts venues remaining closed, this is perhaps not a surprise. More detailed data analysis would be required to determine whether future cash flow and business continuity is of greater concern for these organisations.
- **Tourism, heritage and festivals** (365, 6% in the SE Census) – While we have seen some events move online and heritage organisations start to open up, large events are of course still problematic and their future uncertain. It is also currently unclear whether tourism-based organisations or those enterprises based in tourist areas are seeing an increase in activity and subsequent financial returns. Early data collated by Social Investment Business indicated that areas reliant on tourism had been particularly hard hit; with tourism starting to pick up and an indication of a 'stretched trading period,' it remains to be seen whether these businesses and geographical areas reliant on visitors will see enough comparison to their 'summer trading' period to carry them through quieter financial periods.
- **Sports and leisure** (318, 5% in the SE Census) – More detailed analysis regarding social enterprise sports and leisure organisations has been conducted and *referenced* by the Sport Social Enterprise Network. This is a sector that has received no specific targeted support yet is facing particular challenges. Sports facilities and classes, due to open in phase 3 and 4 of unlocking, have been unable to open and have found challenges in receiving other grants due to the perceptions of access to larger reserves, while having a business that requires more significant ongoing maintenance and repair costs and, for those that operate through other premises, there is a fear that this will continue to be restricted going forward.

- **Environment/recycling** (179, 3% in the SE Census) – As lockdown eased and clear out stock made its way to reuse, many organisations have seen a rise in donations – however, this is coupled with an increased fear of pre-loved goods. This drop off in trade income has both a negative impact on cashflow and broader sustainable development goals in the long term. Areas that may have benefited however could include bike related initiatives, though it is still unclear what the longer term impacts will be.
- **Food/catering/hospitality** (138, 2% in the SE Census) – This is a sector hit hard as lockdown commenced, though some community run venues are starting to open up again. Hospitality businesses in our sector face similar challenges to mainstream hospitality enterprises, though where staff are from a vulnerable group. This is highlighted in this [statement](#) made at the end of March by the Usual Place, based in Dumfries. For food bank related initiatives, Covid-19 has led to increased work, though this was often accomplished against a backdrop of reduced staffing and volunteers.
- **Transport** (110, 2% in the SE Census) – As with other public transport, community transport initiatives have been limited by social distancing and the fear constraints of passengers. Whilst organisations have adapted to support local Covid-19 responses and local authorities have continued to show support, there are concerns regarding longer term financial sustainability.

Key points to note

In looking at OSCR data, we can note that a significantly higher proportion of sports and recreation organisations (56%) and those working in culture and the arts (48%) reported to have stopped operations than overall (36%).

We can also note that of those responding to the OSCR survey, these were the sectors most represented (arts, 32% of respondents and sports 25%). If we compare this to the [Social Enterprise 2019](#) census data, only 14% of the sector is based in the arts and creative industries and 5% in sports and leisure. These high responses to the survey may suggest they are still needing additional support; a statement which is backed up by the answers regarding whether their organisation is facing a financial threat in the next 12 months.

Of those noting they were facing a critical threat in the next 12 months, 82 (35% of responders) were from arts organisations; 61 (25%) from sports and 118 (58%) from leisure and culture. These figures remained high for those expecting some financial threat with 145 (31%), 122 (26%) and 212 (45%) respectively.

OPERATIONAL IMPACTS

- It may not surprise you that 97% of the social enterprises in this survey report a negative impact on their organisation as a result of Covid-19, with 52% noting a disruption to their services. Furthermore, 83% noted that planned work or events were postponed or cancelled.
- Most have seen a marked increase in demand for their services by end users, with only 13% reporting no increase in demand.
- The disruption of services to beneficiaries was reported by a higher proportion of social enterprises working in mental health, advocacy, and social care >60% compared to social enterprises all over (43%).

Additional insights from research with our CIC members:

- Those who already had a strong digital offering are noting less concern regarding their future, with 20% of respondents seeing an increased demand for their services.
- A further 10% of our respondents noted that they had needed to significantly change their operational model, increasing pressure on their staff and with an expected reduced financial return.
- With reduced staff and volunteers, a potential increase in demand and a need to 'keep business going,' this has been a common theme for many organisations affected by Covid-19 regardless of their legal structure.

While our conversations with CIC members only offer insights from a small sample group, we wanted to ensure we had reflected on their experience.

SUPPORT & INFORMATION

What people are asking for: Funding support

The table below highlights the financial support being used or being considered by the organisations responding to the survey at the time data was collated.

Scheme/Fund	Used %	Considering %
Furlough	28	12
TSRF	14	34
Wellbeing fund	8	24
Food fund	1	7
Communities fund	5	31
Scot Gov business grants	6	15
Business interruption loan	1	3
Local authority support	20	40

As one may expect, use of the furlough scheme increases in line with the age and size by turnover of the organisation and we would also note that responses to this survey may themselves have been hampered if staff were furloughed and unable to respond.

The higher percentages relating to local authority support may also demonstrate the typical day-to-day relationship of these organisations with local authorities as the first point of call of support for social enterprises. For fledgling social enterprises that have been in operation less than a year, this need for future local authority funding was 67%, while for social enterprises with over 50 years of operation, this was just 33%. This may demonstrate that organisations that are more established have greater financial resilience, as well as the aspirational notions of early stage organisations.

It is interesting to note that only 3% of the organisations surveyed would want to apply for business interruption loans. A lack of interest in loan finance, compared to grants, may reflect the particular circumstances of the registered charity part of the social enterprise community. There may also be factors at play in terms of the awareness or the particular terms and conditions of the loan scheme. In addition, uncertainty regarding potential future earned income at this time may also be a significant barrier with trustees being nervous to risk the social impact of their organisations in exchange for longer term viability.

The table below shows the full list of responses by organisations replying to the survey regarding expected future sources of support from a suggested list.

Scottish Government Third Sector Resilience Fund	34%
Scottish Government Wellbeing Fund	24%
National Emergencies Trust funding through Foundation Scotland	15%
Scottish Government Food Fund	7%
Scottish Government Supporting Communities Fund	31%
Scottish Government Business Grant Support Schemes	15%
Job Retention Scheme (furloughing)	12%
British Business Bank business interruption loans	3%
Other independent grant funding	39%
Local authority funding	40%
Funding for essential or core costs, such as staffing	34%
More flexibility in currently-funded projects, such as removing restrictions on how funding can be used	25%
Simplified requirements for reporting on grants or outcomes	38%

SUPPORT & INFORMATION

What people are asking for: Non Funding support

Over 70% of responders note that information and advice on claiming financial support has or will help them. While this was the most popular request, 57% also noted they had or would like help in how to continue operating during a pandemic.

This high 57% figure demonstrates an understandable need for guidance during an unprecedented time of crisis. Interestingly, around half of respondents articulated that they won't need this to deal with a similar event in the future, demonstrating adequate knowledge-building as a result of navigating the current situation.

The high number of organisations who need information on financial support in the future was again understandably high. This may be a result of perceived readily available resources during the current event or simply the lack of need. Flexibility in reporting was fairly high, perhaps reflecting the urgency and tight deadlines associated with a pandemic crisis situation.

There was an even spread across the other categories, reflecting the diversity of sizes and types of organisation and their particular, individual needs. For new social enterprises operating for less than a year, this need for future guidance was 67%, compared to 48% for organisations over 50 years old. Again, this may be that more mature organisations are simply bigger and better resourced, although around half of them still required future guidance support. And 83% of organisations operating for less than a year noted that they had or would like more information and guidance on claiming financial support going forward.

The table below shows the full list of responses by organisations replying to the survey regarding future support needs from a suggested list.

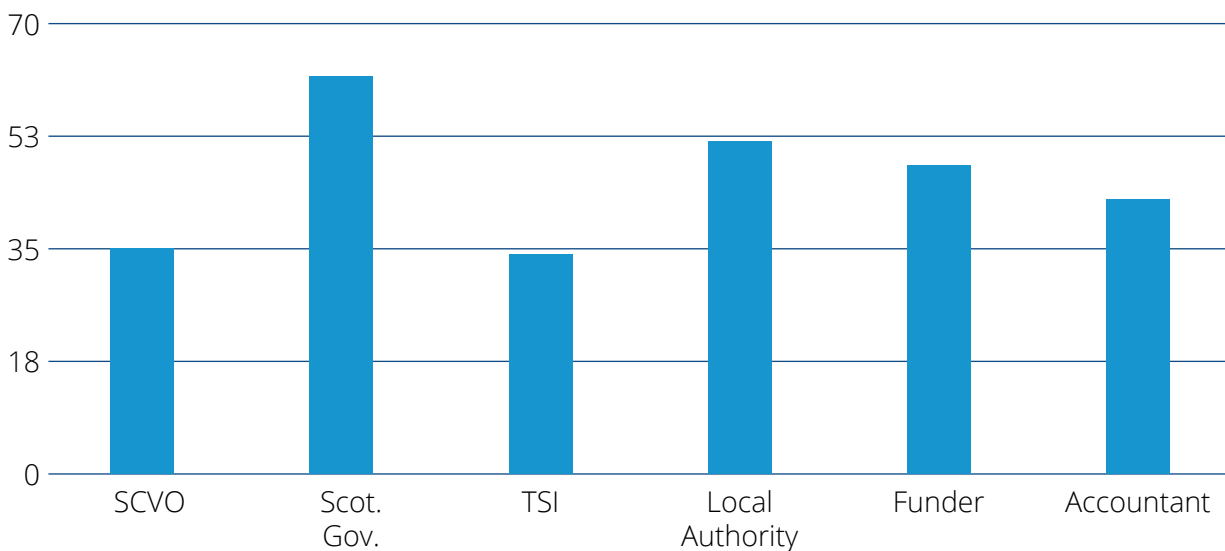
Information and advice on the financial support charities can claim	42%
Flexibility in filing or reporting deadlines	39%
Support or training on staffing issues	19%
Support or training on volunteer issues	18%
Support or training on remote leadership	22%
Technical support and training for working remotely	20%
Staff, charity trustee and volunteer wellbeing resources	28%
Maintaining momentum on current policy and government business unrelated to Covid-19	25%
More guidance on how charities should continue during the pandemic	51%

SOURCES OF INFORMATION

Where people are looking for guidance and information

In order to improve take up of any future funds in the Recovery Phase and maximise impact, it will be important to target communications. While as noted above no questions were asked in this survey regarding support from intermediaries and membership organisations, survey data highlights that 490 (63%) social enterprises use The Scottish Government as a source of help and advice, 389 (50%) use their Local Authority, 362 (47%) use their funder, 317 (41%) use their Accountant, 269 (35%) use the SCVO Coronavirus Third Sector Information Hub, and 263 (34%) use their local Third Sector Interface.

SOURCES



Key points to note

Given the broad range of sources social enterprises go to looking for information it is clear that communications through Social Enterprise Intermediaries will also be important in the Recovery Phase. It will be important for social enterprises to work with their local partners to identify plans to continue trading and offering services as they move forward and, where appropriate, access support to best inform and advise them as they consider options.

MOVING FORWARD

How else can we inform the recovery efforts ahead?

There are many more observations worth making. While it is important to recognise the critical financial impact for larger social enterprises and the disruption to their beneficiaries, it would be wrong to overlook small organisations, their key role in leading community resilience, and how important that will be in the coming months.

There are many areas such as health, food and other direct services that have been a priority over the last few months, but over the next period, it is important to ensure that other organisations, including those operating across the arts, culture, sports and recreation are supported to ensure the overall wellbeing of the Scottish public.

As we look at specific sectors in line with recovery efforts, we must also consider how future periods may affect their work and services. Expected rises in unemployment and subsequent income levels will no doubt have an effect on our communities and there will be a need for greater interventions from these organisations.

Mental health, changes to the office environment and ongoing changes in our use of digital technology will impact the way social enterprises respond to support government, their communities, and their beneficiaries moving forwards.

Furthermore, we may want to consider whether those with local authority support or in receipt of funding will face impacts further down the line as resource constraints given Covid-19 spending become more apparent.

While social enterprises are finding new ways to operate, proving their creativity, flexibility and resilience, we are also adjusting. These findings have created new priorities for Social Enterprise Scotland and we are considering the partnerships and data insights that we need to inform and support the sustainability and long-term resilience of the sector. In particular, we are working with The Scottish Government, OSCR, Evaluation Support Scotland, and SCVO to ensure we get recovery resources to the organisations who need it.

ADDITIONAL FACTORS

Which other factors should we consider?

- The next 6 months to March 2021 includes the winter season with a higher potential incidence of Covid-19 in our communities; the end of the Job Retention Scheme; a traditionally quieter period for organisations involved in tourism or operating in tourist areas; and an opportunity for social enterprises to maximise the impact of Recovery Funds available to them.
- We can expect that front line services provided by social enterprises in areas such as food distribution, health and care, wellbeing, mental health, employability and advocacy will continue to experience higher demand.
- Social enterprises are continuing to review and adapt their business models and operations, and the wider sector is working in collaboration with central and local government and funders to identify areas of highest need.
- These insights from the survey of 774 organisations is only a starting point and Social Enterprise Scotland looks forward to continuing to develop the information sources and uses of data to build on the work of the survey with partner organisations and further inform analysis and insights.
- The Third Sector Resilience Fund based their awards, in part, on levels of reserves held within organisations. While this is understandable in terms of supporting those most at risk of closure, we also need to ensure that we do not put organisations who have built up financial resilience at future risk as their reserves become too depleted, but help safeguard their viability.

IDENTIFIED GAPS & RISKS

- The analysis and insights offered by the survey data is a good start, but the survey size for social enterprises is relatively small and may not be fully representative of organisations across the sector.
- If there is one clear thing that the detailed findings show, it's that the picture is complex and organisations are affected differently. While there is a wealth of data available, there are also areas that the survey didn't capture, for instance: What is the nature of the impact on beneficiaries? What about 12 months and beyond? What sort of sector support will be available to them then, and what funding and non-funding support will they need at this time?
- Because the survey data shared with us was anonymous, it does not include raw data such as organisation name and postcode.
- The survey was issued in May 2020, so the answers from respondents only represents a snapshot in time, and we are in a context which moves quickly.
- Our analysis in this report only includes insights from a small sample of CICs.

There are of course other gaps in the data which could inform further analysis. For instance, no question was asked regarding whether organisations had been helped by intermediary and support bodies more focused on the social enterprise sector, but we hope we were able to highlight key findings and needs that can inform future recovery for our sector going forward.

Finally, we have also been following data collected through Social Investment Business as they have sought to track, in geographical terms, the areas most impacted in terms of reductions in consumer spending.

While their data has been limited to card transaction from RBS and is not a complete analysis of consumer spending both in terms of provider or other financial means, it is still a useful indicator to pinpoint the communities hardest hit in reductions of consumer spend.

As we can expect, the slowdown of consumer spending will impact local economies, jobs retention and creation, and therefore community need for further support. We encourage you to access the data through the link below.

[Social Investment Business Credit Card data](#)

APPENDIX

Covid-19 Impact Social Enterprise Tables (Rows and Titles)

The Excel spreadsheet has 1630 rows and is split into questions and answers.

Q1a. In which of the following ways, if any, has your charity been affected by Covid-19 and the lockdown measures more generally? (Row 7)

Q5b: Position of charity in the next 3 months (Row 722)

Q1b. Extent to which affected by: Increased demand for services (row 64)

Q5a: Position of charity in the next 3 months (Row 741)

Q1b. Extent to which affected by: Disruption of support or services to beneficiaries (row 88)

Q6a: Sources of help and advice used. OSCR's Covid-19 update and guidance for charities (Row 773 to 1056)

Q1b. Extent to which affected by: All charity operations suspended (Row 112)

Q7a: Funding support that would help us in the future (Row 1057)

Q1b. Extent to which affected by: Lost income from fundraising (Row 136)

Q7a: Funding support that has already helped us (Row 1096)

Q1b. Extent to which affected by: Short-term risk (within next 6 months) to charity reserves (Row 352)

Q7b: Non-funding support that would help us in the future (Row 1174)

Q1b. Extent to which affected by: Long-term risk to charity reserves (Row 376)

Q8 : What should OSCR be doing to help your charity overcome these challenges (Row 1267)

Q2. In what ways, if any, has your charity responded to Covid-19 and the lockdown measures? (Row 521)

Q10: Age of Charity (Row 1314)

Q4a: How would you rate the threat that Covid-19 and lockdown measures generally pose to your charity's financial viability in the next 3 months? (Row 611)

Q11: Income (Row 1341)

Q4b: How would you rate the threat that Covid-19 and lockdown measures generally pose to your charity's financial viability in the next 6 months? (Row 634)

Q12: Area of operation (Row 1372)

Q4c: How would you rate the threat that Covid-19 and lockdown measures generally pose to your charity's financial viability in the next 12 months? (Row 659)
Financial threat within the next 12 months (Row 684)

Q12: Local Authority Area (Row 1401)

Q13: Usually, what are your charity's main sources of income? (Row 1480)

Q5a: Position of charity in the next 3 months (Row 703)

Q14: Scale (Row 1527)

Q15a: Paid staff members (Row 1548)

Q16: In which sector or sectors does your charity mainly operate? (Row 1575)resources to those who need it.



Learn more about social enterprise in Scotland:

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