DTNI
EMPOWERING LOCAL COMMUNITIES

COMMUNITY WEALTH BUILDING IN PRACTICE:

EVALUATING CVSE READINESS IN NORTHERN IRELAND

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Based on MSc dissertation awarded Distinction at Ulster University

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Executive Summary

Community Wealth Building (CWB) has emerged as a transformative approach to local economic development, prioritising the retention and circulation of wealth within communities rather than the extraction of resources by external investors. Unlike conventional growth models that privilege corporate actors, CWB seeks to embed economic democracy by strengthening local supply chains, fostering community ownership, and ensuring that economic benefits are equitably distributed among residents and workers (Longlands, 2024; DTNI, 2023). Central to this model is the role of social enterprises (SEs), which operate at the intersection of commercial viability and social impact, positioning them as key drivers of resilience and inclusive growth (QCAP, 2022; DTNI, 2022).

CWB represents a proactive re-design of economic systems through mechanisms such as worker-owned cooperatives, community asset transfers, and progressive procurement practices. Public institutions, particularly governments, play a vital role in enabling this model through legislation, procurement strategies, and the creation of supportive policy environments (CLES, 2024). Equally, the private sector can contribute by embedding ethical practices, strengthening local supply chains, and partnering with SEs to create shared value and long-term regional resilience (DTNI, 2022).

Internationally, the model has gained traction across Scotland, the Basque Country, Italy, and U.S. regions such as Cleveland, with notable adoption by anchor institutions like the UK's National Health Service, which increasingly prioritises local suppliers and employment (Prinos, 2023; CLES, 2024). Despite this growing momentum, the capacity of the Community, Voluntary and Social Enterprise (CVSE) sector to embed CWB principles remains underexplored. In Northern Ireland, where the social economy is developing as a key pillar of inclusive growth, questions persist regarding the sector's readiness to translate CWB theory into practice (Whyman & Manley, 2022).

This study critically evaluates the preparedness of Northern Ireland's CVSE sector to adopt CWB as a model for sustainable economic transformation. Three key objectives guide the research:

1. To examine the extent of awareness and understanding of CWB within Northern Ireland's CVSE sector.
2. To identify and analyse the barriers and enablers that may influence uptake and implementation across the sector.
3. To assess the sector's readiness to operationalise CWB and to consider the enabling conditions required for transition from aspiration to implementation.

Findings reveal three overarching insights. First, awareness of CWB has increased significantly, though knowledge levels remain uneven: senior leaders demonstrate stronger engagement than frontline staff or smaller organisations. Second, systemic barriers hinder widespread adoption, including chronic underfunding, staffing shortages, limited business expertise, and inconsistent policy support. Third, while certain regions—such as Derry, where pilot projects have been trialled—show higher levels of readiness, overall capacity across the sector is fragmented.

Taken together, these findings suggest that while enthusiasm for CWB exists within Northern Ireland's CVSE sector, its translation into practice requires targeted investment in capacity building, leadership development, and institutional support. Without these enabling conditions, CWB risks remaining a policy discourse rather than a fully embedded practice. By situating Northern Ireland within an international comparative framework, this research contributes strategic insights into how economic democracy can be advanced through community-led development.

CHAPTER ONE: ESTABLISING THE RESEARCH FRAMEWORK

1.1 Introduction

This study explores Community Wealth Building (CWB) as a transformative approach to economic development within the international business domain. CWB is an emergent model that redistributes wealth, ownership, and decision-making power more equitably across local communities (Longlands, 2024). Rooted in principles of economic democracy and social equity, CWB challenges traditional growth-led economic models that often privilege external investors and multinational corporations. It emphasises local procurement, community ownership of assets, worker cooperatives, and social enterprise-led innovation (QCAP, 2022). In doing so, it brings into focus new opportunities for sustainable, place-based business strategies.

The relevance of this research to international business is grounded in a growing shift toward inclusive and socially responsible business practices. Internationally, governments in Scotland, the Basque Country, Ireland, and the U.S. are adopting CWB principles in different ways (Prinos, 2023). Countries and regions are increasingly exploring how to embed community-focused principles within policy and enterprise (CLES, 2024). This trend is reshaping business strategies, especially in economically marginalised or post-industrial areas seeking resilience and regeneration (European Commission, 2024).

Globally, the social enterprise movement has become a significant component of modern economies. In the European Union, for example, there are over 246,000 social enterprises, forming part of a wider social economy of more than 4.3 million entities, which collectively employ approximately 11.5 million people—around 6.3% of the EU workforce (European Commission, 2024). In Northern Ireland, the sector is comparatively smaller but still economically significant, comprising an estimated 1,225 organisations, employing over 17,300 people, and generating nearly £933 million in turnover annually (Department for the Economy, 2025). Beyond Europe, social enterprises are increasingly recognised as contributors to the UN Sustainable Development Goals, particularly in tackling inequality, poverty alleviation, and building

community resilience (OECD, 2022). Taken together, these figures underscore the growing global relevance of social enterprises as vital agents of inclusive and sustainable economic development.

By investigating the readiness of SEs and the Community and Voluntary (C&V) sector in Northern Ireland—a region marked by both socio-political complexity and economic transition (Whyman & Manley, 2022)—to implement a CWB framework, this study contributes to modern debates on how international business practices can support locally-led, inclusive economic systems. The global expansion of social enterprises highlights that this is not merely a regional concern but part of a wider reconfiguration of how business is conceptualised and practiced in the twenty-first century.

1.2 Rationale for Study

Traditional regional development strategies, focused on inward investment and large infrastructure, often fail to deliver equitable benefits, especially in deprived or post-conflict areas. Recent crises highlight the need for locally grounded, resilience-focused economic models (OECD, 2023; Resilience Intelligence, 2023). This backdrop has intensified interest in CWB across Europe, North America, and other regions. Notably, cities like Preston (UK), Mongrogon (The Baque Country), Cleveland (US), and regions in Scotland and Ireland have adopted CWB policies, underlining the model's global adaptability (CLES, 2024).

In the context of international business, CWB intersects with themes such as social enterprise development, stakeholder capitalism and sustainable and circular value chains. The Basque Country exemplifies this model through its well-developed cooperative ecosystem—particularly the Mondragon Corporation and solidarity economy networks such as REAS-Euskadi and Olatukoop—which prioritise democratic governance, inter-cooperation, and regionally embedded innovation. Rather than scaling through conventional capitalist growth, these organisations expand through federated networks that promote community wealth, social cohesion, and social value (Etxezarreta et al., 2025; Bretos and Errasti, 2017; Cheney et al., 2014). In Australia,

Community Wealth Building principles are evident within a robust social enterprise sector, comprising more than 12,000 enterprises that contribute approximately $21.3 billion annually (around 1% of GDP) and employ over 206,000 people, or 1.6% of the national workforce (Social Enterprise Australia, 2022/23). Significantly, analysis of nearly 5,800 Australian social enterprises found that around 86% of revenue is generated through trade rather than grants or donations, underscoring the sector's economic self-sufficiency and alignment with CWB's emphasis on sustainable, locally rooted business models (RISE, 2023). For regions like Northern Ireland—where social economy actors are playing an increasingly prominent role—there is growing potential for public-private-community partnerships to redefine economic success (DTNI, 2022). Yet, despite its policy appeal, the practical implementation of CWB, particularly in devolved and divided societies, remains under-researched (Whyman & Manley, 2022). Understanding how key actors—government, private sector, and social enterprises—can collaboratively engage with this model is crucial for building frameworks that are context-sensitive, scalable, and inclusive.

1.3 Justification of Research

This research is both timely and necessary. CWB has moved from conceptual innovation to policy experimentation in various global contexts, yet its implementation requires tailored approaches that reflect local economic, political, and social dynamics (Vuin et al., 2025).In Northern Ireland, a region with a complex political history and a relatively underdeveloped social economy compared to Scotland, the capacity for CWB adoption remains unclear. While policymakers and practitioners are beginning to explore inclusive economic frameworks, a lack of empirical evidence and shared understanding around CWB hinders progress (DTNI, 2024). In 2021 the then Minister for Communities, Deirdre Hargey established an independent panel to review who can grow and scale our Community Wealth Building approaches this culminated in the publication of an independent report "*Recommendations to advance Community Wealth Building in Northern Ireland"*. This report put forward 26 recommendations to

advance CWB and deliver real and sustainable change (Department for Communities, 2022).

This study is particularly relevant to international business research because it bridges global thinking on equitable economic development with local implementation challenges. It also advances current academic discourse by exploring how non-traditional economic actors—such as social enterprises—can drive systemic change through collaborative models like CWB. Key areas requiring investigation include international best practice, state of readiness of the social sector including social enterprises and Community and Voluntary sector, stakeholder awareness, and the viability of models like social clustering for operationalising CWB. This research will fill a critical gap by offering empirical insights into the enabling conditions, barriers, and strategic pathways for CWB in Northern Ireland, thereby contributing to broader debates on sustainable and inclusive international business models.

1.4 Research Problem, Aim and Objectives

This research is driven by the need to critically evaluate the capacity and readiness of the social sector in Northern Ireland to adopt CWB as a transformative model for inclusive economic development. While the principles of CWB have gained international traction, their implementation in regions with complex political and economic landscapes remains underexplored (Whyman & Manley, 2022). The study aims to assess whether the necessary conditions such as policy frameworks, awareness, drivers, enablers, and stakeholder alignment exist in Northern Ireland to support the social sector in the development of locally rooted, equitable economic systems. To achieve this, the research focuses on 3 key objectives. First, it seeks to examine the extent of awareness and understanding of CWB within Northern Irelands CVSE sector. Secondly it aims to identify and analyse the barriers and capacity constraints faced by the social sector, to understand the structural and practical limitations to CWB implementation, and finally it aims to assess the sector's readiness to operationalise CWB and to consider the enabling conditions required for transition from aspiration to implementation. These objectives collectively support a

comprehensive investigation into the viability and contextual adaptability of CWB within Northern Ireland's evolving economic landscape.

1.5 Outline Plan and Structure of the Dissertation

The structure of this dissertation follows a logical progression designed to explore the research objectives in depth. The study begins by introducing the research context, outlining the background, rationale, and significance of the topic, and presenting the central aim and objectives. Following this, the discussion turns to the existing body of literature, examining key theoretical concepts and debates surrounding Community Wealth Building, social enterprise, and inclusive economic development. This review also identifies important gaps in the current knowledge base, which the research seeks to address. We then move on to the methodological design, where the research and data collection strategies are explained and justified in relation to the study's objectives. After establishing the methodology, attention shifts to the presentation and analysis of findings, where data is interpreted thematically with reference to the literature. The final part of the dissertation draws together the key insights, offering conclusions and recommendations for policy, practice, and future research. This overall structure allows for a systematic exploration of the research question while building a clear and coherent narrative throughout the study.

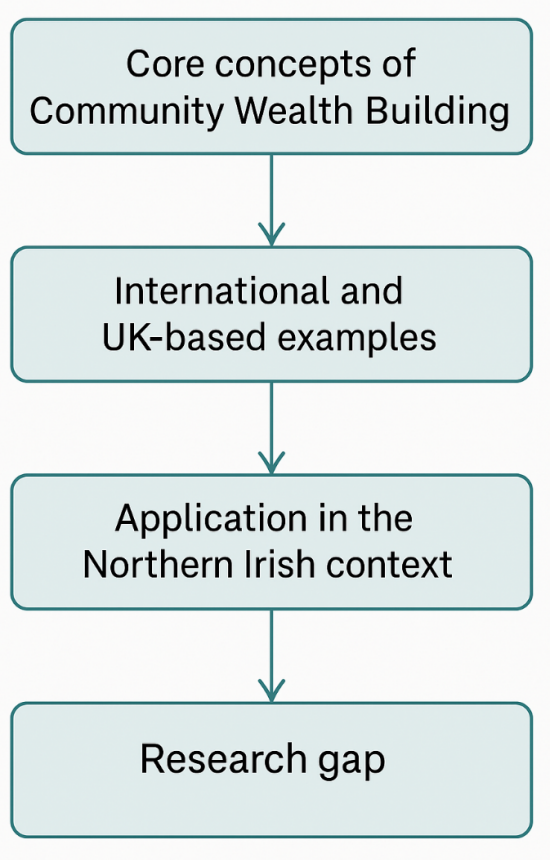
1.6 Conclusion

This opening chapter introduced the research focus on CWB as a model for inclusive economic development, outlined its rationale and significance in Northern Ireland, and set out the research aims and objectives. It also explained the dissertation structure. The next chapter reviews the literature on CWB, examining key theories, empirical studies, and contextual factors that inform the research framework and methodological design.

CHAPTER TWO: THEORETICAL PERPECTIVES & GLOBAL PRACTICE

2.1 Introduction

This chapter provides a comprehensive review of the literature relevant to Community Wealth Building and its potential application within the social sector in Northern Ireland. The chapter is structured to move from broad conceptual and theoretical perspectives to context-specific insights and, finally, to the identification of research gaps that justify the current study. The chapter begins with an overview of the key literature fields that inform the study, including theories of inclusive local economic development, cooperative ownership, and social enterprise engagement. It then examines international and UK-based case studies, such as Mondragón in the Basque Country, the Cleveland Model in the United States, and the Preston Model in the UK, to illustrate how CWB strategies have been implemented in practice. The chapter also highlights the role of social enterprises and anchor institutions as critical actors in operationalising CWB, as well as the challenges they face in scaling, sustaining, and adapting these models. Finally, the chapter identifies specific gaps in the literature, particularly regarding the readiness of the Northern Irish CVSE sector to implement CWB and the relevance of international best practices to this context. This progression from theory to practice to research gaps provides the foundation for the empirical study, linking the review directly to the research objectives.



2.2 Review of the Key Literature

2.2.1 Context and Definition

Community Wealth Building has emerged as a response to the limitations of neoliberal economic models, which prioritise profit over social welfare and often exacerbate inequality (Longlands, 2024). Core strategies—including cooperative ownership, progressive procurement, and ethical investment—are widely recognised as mechanisms for strengthening local economic resilience and promoting inclusive growth (CLES, 2018). Scholars such as McInroy and The Democracy Collaborative conceptualise CWB not merely as a set of local development tools but as a systemic economic transformation framework, emphasising democratic ownership, reduced financialisation, and the local circulation of wealth (The Democracy Collaborative). Guinan and O'Neill (2019) formalise this approach through five interrelated pillars: inclusive and democratic enterprise, locally rooted finance, fair work, just land and property use, and progressive procurement. Collectively, this body of literature establishes the theoretical and practical foundations of CWB, highlighting its potential to embed economic justice and community-led development at multiple levels.

2.2.2 Examples of Practice Globally

Building on the theoretical foundations of Community Wealth Building, international and UK-based case studies provide concrete illustrations of how the model has been operationalised, demonstrating both successes and challenges.

UK Case Studies:

In the UK, Preston's municipal adoption of CWB—commonly referred to as the "Preston Model"—has become a leading example of how local authorities can redirect procurement to local businesses and social enterprises, creating dense networks of cooperatives and fostering local economic retention. Between 2013 and 2024, local procurement spending in Preston rose from £70 million to over £112 million, contributing to increased employment, particularly for traditionally excluded groups such as disabled people and ethnic minorities (Preston City Council & CLES, 2024; Sánchez-Vidal & Werner, 2024). Beyond Preston, other UK cities have experimented with CWB-inspired strategies. For example, Glasgow's "Community Benefits" approach incorporates local employment and social value criteria into public contracts, creating opportunities for small and medium-sized enterprises and social enterprises to participate in municipal supply chains (DTNI, 2022). Sheffield and Liverpool have similarly explored locally oriented procurement policies and community-led development projects, although outcomes have been more variable due to differing local governance and institutional support structures (Sheffield, 2018; Redwood, 2022). Collectively, these initiatives highlight the growing momentum of community wealth building across the UK and its potential to reshape local economic systems toward greater equity and sustainability.

International Examples:

Internationally, the Mondragón cooperative network in The Basque illustrates the potential for long-term, systemic implementation of CWB principles. Founded in 1956, Mondragón has grown into a federation of over 80,000 workers across industrial, financial, and social cooperatives, supported by a cooperative bank, a technical university, and social insurance funds (Prinos, 2023; Whyte & Whyte, 1988). Its integrated ecosystem demonstrates how education, finance, and governance can

reinforce one another to sustain local wealth and employment. Similarly, the Evergreen Cooperatives in Cleveland, Ohio, provide a practical example of CWB in a U.S. municipal context. Using the purchasing power of hospitals and universities, Cleveland has stimulated the growth of worker-owned enterprises in sectors such as renewable energy, laundry services, and urban agriculture, directly benefiting economically disadvantaged neighbourhoods (The Democracy Collaborative, 2010; Kelly & Howard, 2019).

Other European examples further illustrate variations in CWB application. In Bologna, Italy, supportive legislation and government subsidies have fostered a thriving cooperative sector, strengthening local economic stability and social inclusion (Peter et al., 2023). In Germany, the "Genossenschaften" (cooperatives) sector, particularly in housing and retail, demonstrates how legal frameworks, cooperative governance, and strong local networks can sustain community-oriented economic models over decades (Errasti, et al., 2025). These examples highlight that while CWB principles are consistent—anchoring wealth locally, supporting democratic participation, and integrating social objectives—implementation is shaped by local policy environments, institutional capacities, and cultural norms.

Role of Social Enterprises (SEs):
Across these contexts, SEs consistently emerge as pivotal actors. In Preston and Glasgow, SEs have leveraged procurement reforms to expand their operations and embed social purpose within local supply chains (DTNI, 2024; Carlson, 2023). Similarly, Mondragón's cooperative model illustrates the scalability of enterprises with a dual focus on social mission and economic sustainability (Prinos, 2023). However, challenges are evident: SEs in the UK and U.S. often struggle with access to finance, scaling operations, and aligning organisational objectives with broader CWB goals (Wilson, 2024; Rowe et al., 2017). International case studies demonstrate that supportive policy frameworks, cooperative networks, and institutional partnerships are key to overcoming these barriers, yet the relevance of these strategies to Northern Ireland remains untested.

Taken together, these UK and international examples demonstrate the potential of CWB to deliver economic, social, and democratic outcomes, while also highlighting the

importance of context-specific adaptation, institutional commitment, and sectoral capacity. This review provides the empirical and conceptual backdrop for exploring Northern Ireland's social sector readiness and the potential applicability of international best practices.

2.2.3 Critique of CWB

The literature highlights several interrelated themes and challenges critical for understanding CWB and its applicability to Northern Ireland. These themes not only capture the mechanisms and outcomes of CWB but also highlight the structural, institutional, and cultural factors that affect implementation.

Local Economic Retention and The Circular Economy

A core objective of CWB is retaining wealth within local communities to counter the extraction of resources by global capital and promote inclusive economic growth (Guinan & O'Neill, 2019; Longlands, 2024). For example, Preston's local procurement strategy has redirected over £112 million in spending back into Preston, fostering employment and supporting small businesses (Preston City Council & CLES, 2024). Similarly, the Evergreen Cooperatives in Cleveland, Ohio, demonstrate how public contracts from hospitals and universities can anchor worker-owned enterprises in economically disadvantaged neighbourhoods, ensuring that wealth remains within the community (Kelly & Howard, 2019). In Mondragón, the integration of cooperatives with education and finance has created a self-reinforcing ecosystem that circulates wealth and maintains employment for over 80,000 workers across multiple sectors (Prinos, 2023). These examples illustrate that strategic interventions can tangibly enhance local economic retention, but their success depends on long-term institutional and community support.

Public Bodies and Public Procurement

Publicly owned institutions such as hospitals, schools and roads can act as powerful levers for CWB by deliberately redirecting spending toward local and socially responsible suppliers. In the UK, the Preston Model demonstrates the potential of public sector procurement, which combined with partnerships with social enterprises

and co-operatives, has increased opportunities for locally owned businesses to grow (Amin et al., 2019). Similarly, in Cleveland, the Evergreen Cooperative initiative uses hospital procurement contracts to support worker-owned businesses in sectors such as laundry services, renewable energy, and urban agriculture, directly benefiting local employment and economic resilience (The Democracy Collaborative, 2010). In Italy, Bologna's cooperative sector has flourished due to public procurement policies that favour local and cooperative providers, ensuring that public expenditure contributes to economic stability and social inclusion (Peter et al., 2023). These cases underline that procurement is not merely an administrative task but a strategic intervention that aligns institutional resources with community-focused economic development.

Social Enterprises as Key Actors

Social enterprises occupy a critical role in operationalising CWB by balancing social mission with financial sustainability. Evidence from the UK and internationally shows that SEs can reinvest profits to support marginalised communities, deliver essential services, and foster democratic participation. For instance, Preston-based SEs have benefited from local procurement reforms, allowing them to scale operations while maintaining social objectives (DTNI, 2022; Amin et al., 2019). In Spain, Mondragón's cooperatives demonstrate the potential for worker-owned enterprises to operate at regional and national scale while preserving social purpose (Prinos, 2023). However, challenges remain: many SEs struggle with limited access to finance, difficulties in scaling, and regulatory constraints (Wilson, 2024). The U.S. experience with the Evergreen Cooperatives also shows that local success may be constrained by a broader national policy environment that prioritises market-driven growth over community wealth retention (Rowe et al., 2017). These examples highlight the importance of supportive institutional frameworks and policies in enabling SEs to contribute effectively to CWB.

Adaptation and Transferability of International Models

International models of CWB offer inspiration, but contextual differences necessitate careful adaptation. Mondragón's cooperative ecosystem is deeply embedded within Basque cultural traditions of solidarity and social trust, which are difficult to replicate in other regions (Kasmir, 1996; Errasti, Bretos & Las Heras, 2025). In Cleveland, the

success of the Evergreen Cooperatives relied on strong local political leadership and partnerships with anchor institutions, factors not universally present in all U.S. cities (The Democracy Collaborative, 2010). Preston illustrates that change is possible, but it required innovative local governance, active collaboration with the social sector, and significant investment in community capacity-building (Whyman & Manley, 2022). These examples collectively highlight the need to tailor CWB strategies to local governance structures, institutional capacities, and socio-cultural contexts.

Sustainability, Scalability, and Institutional Commitment

CWB initiatives face challenges in achieving long-term sustainability and scaling their impact. Critics argue that without institutional commitment and alignment with broader policy frameworks, initiatives risk being tokenistic or unsustainable (Wright, 2016; Hatcher, 2021). Preston and Cleveland demonstrate that scaling CWB requires ongoing political support, investment in human and social capital, and alignment between local and central government, and the social sector (Redwood, 2022; Prinos et al., 2023). In Mondragón, the federation's longevity has depended on a combination of cooperative governance, education, and financial infrastructure that maintains organisational stability and worker engagement over decades (Whyte & Whyte, 1988). These cases underline that scaling and sustaining CWB is contingent on a complex interplay of policy, culture, and organisational capacity. Taken together, these themes illustrate the multi-dimensional nature of CWB, the centrality of SEs and the public sector, and the critical influence of context on implementation. They provide a framework for the present study to investigate the readiness of Northern Ireland's social sector, identify potential barriers, and explore how lessons from international and UK-based models can be adapted to support locally led, inclusive economic development.

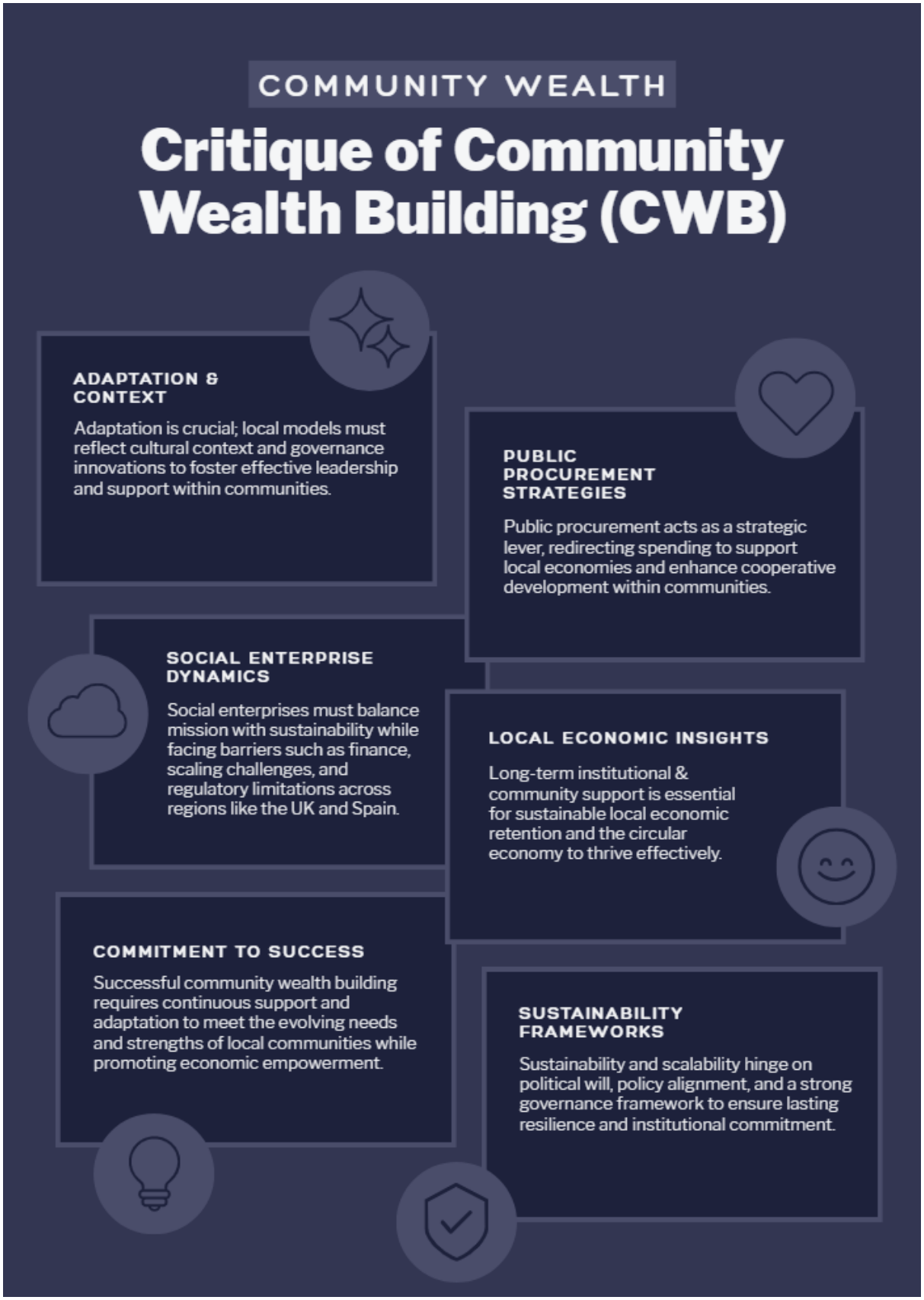


Table 1: Critic of CWB

2.3 Identification of the Need for Research

Despite the growing theoretical and practical literature on Community Wealth Building (CWB), significant gaps remain in understanding how these principles can be operationalised within the Northern Irish context. As O'Neill and McCann (2022) argue, while CWB is increasingly championed by local authorities and policymakers across the UK, there is limited empirical evidence on how these models can be translated into regions with distinct socio-political and economic legacies such as Northern Ireland. Notably, no studies to date have systematically evaluated the readiness of the Community, Voluntary, and Social Enterprise (CVSE) sector to engage with and implement CWB initiatives. Organisational awareness, capacity, and willingness to participate remain largely undocumented, which constrains the ability of policymakers and practitioners to design effective strategies that embed inclusive and locally rooted economic practices (Bentham et al., 2019; Kelly & McInroy, 2019).

Furthermore, while international case studies such as Mondragón, the Cleveland Model, and the Preston Model offer valuable lessons on cooperative ecosystems, public sector procurement, and localised wealth circulation, the literature consistently cautions against the direct transfer of such approaches across contexts. For example, Jonas and Ward (2019) and Manley et al. (2021) note that structural differences in governance arrangements, regulatory frameworks, and institutional capacity require careful adaptation rather than wholesale adoption. This indicates the need for systematic investigation into which international best practices are both relevant and feasible for Northern Ireland, and how these might be reconfigured to support sustainable, community-led economic development.

Social enterprises (SEs) have been identified as central actors in advancing CWB (Hazenberg & Hall, 2016; Bailey & Pearce, 2021). Yet, empirical studies highlight persistent challenges—such as limited access to finance, difficulties in scaling, and tensions between maintaining social purpose and achieving financial sustainability that may constrain their role within localised wealth-building initiatives (Prinos, 2023; Wilson, 2024). Scholars such as Roy et al. (2014) and Mason et al. (2017) have explicitly called for more place-based research into how SEs navigate these tensions in differing

institutional environments. Understanding how Northern Irish SEs contend with these barriers, and how public policy interventions such as procurement reform and anchor institution strategies can support their participation, is critical for ensuring that CWB initiatives generate meaningful and enduring social and economic outcomes.

In light of these gaps, the present study is guided by the assumption that effective implementation of CWB in Northern Ireland requires both sectoral readiness and the contextual adaptation of international best practices. The research objectives are therefore to: (1) evaluate the preparedness of CVSE organisations to adopt CWB principles, (2) identify potential barriers and facilitators within the sector, and (3) explore the applicability of international and UK-based CWB strategies to the Northern Irish context. By addressing these objectives, the study responds to recent scholarly calls (Bentham et al., 2019; Bailey & Pearce, 2021; Jonas & Ward, 2019) for empirical, context-sensitive investigations that can inform policy design, strengthen organisational collaboration, and support the sustainable integration of CWB as a locally relevant, community-led economic development strategy.

2.4 Conclusion

This chapter has traced the development and implementation of Community Wealth Building, highlighting social enterprises, anchor institutions, and key themes such as local economic retention, procurement, and sustainability. It also identified gaps: there is no empirical research on CVSE sector readiness in Northern Ireland, and the applicability of international and UK best practices remains unexamined. The next chapter outlines the methodology to address these gaps, empirically evaluating sector readiness, barriers, and lessons from international CWB to inform locally relevant strategies and policy recommendations.

CHAPTER THREE: METHODOLOGY

3.1 Introduction

This chapter outlines the research methodology employed in this study, which investigates the readiness of the SE and community and voluntary sector in Northern Ireland to adopt CWB as a transformative economic model. It provides a detailed description of the research philosophy, methodological approach, data collection methods, and analytical procedures. The chapter also justifies the choice of methods, explains the steps taken during data collection, and highlights the limitations and ethical considerations associated with the study. Each section demonstrates how the methodology aligns with the research aim and objectives, ensuring that the study generates valid, reliable, and contextually relevant insights.

3.2 Justification of the Research Philosophy

Research can be approached through different philosophical positions, each shaping how questions are asked, data are collected, and findings are interpreted. Quantitative research is often associated with positivism, which focuses on measuring observable phenomena, identifying patterns, and drawing conclusions that can be generalised across populations (Bryman, 2016). Positivist research typically addresses "what," "how many," or "how often" questions, often by narrowing the focus to a limited number of variables (Punch, 2014). In contrast, interpretivism underpins much qualitative research, emphasising the importance of understanding experiences, motivations, and meanings. This approach is particularly well suited to exploring "how" and "why" questions within complex social contexts, where nuance and depth are essential (Thomas, 2006). A third perspective, pragmatism, offers greater flexibility. Rather than being tied to a single philosophy, pragmatism prioritises the use of whatever methods best address the research question, with the emphasis placed on generating useful, practice-oriented insights (Saunders, Lewis & Thornhill, 2019).

This study adopts a pragmatic research philosophy, as Community Wealth Building (CWB) is a complex, context-dependent model that cannot be fully understood through a single lens. A purely positivist approach risks overlooking its social and political dynamics, while an exclusively interpretivist approach may fail to capture broader sectoral trends. Pragmatism enables the integration of both perspectives, combining insights from policymakers, social enterprise leaders, and practitioners in local economic development. This flexibility is particularly important for CWB, where theory and practice are tightly interwoven and context matters greatly (Saunders et al., 2019).

In line with this, the study employs both inductive and deductive reasoning. Deduction allows theory to be tested in practice, providing structure and clarity, though it has been criticised for oversimplifying complex realities (Bryman, 2016; Punch, 2014). Induction, by contrast, generates theory from the data itself, producing context-rich insights but with less generalisability (Thomas, 2006). A pragmatic stance allows both logics to be used iteratively, moving flexibly between testing assumptions and building new understandings.

This reasoning informs the choice of a mixed-methods design. Surveys are typically associated with quantitative research because they produce broad, comparable data (Fowler, 2014). However, surveys can also incorporate open-ended questions, allowing for qualitative insights that add depth to statistical findings (Oppenheim, 2000). In this study, the survey was administered online, a method shown to be effective for reaching dispersed populations in the community and voluntary sector, while also being cost-efficient and time-effective (Wright, 2005; Evans & Mathur, 2005). To complement this breadth, qualitative interviews were conducted to provide richer, more detailed accounts of stakeholder experiences. Ten interviews were undertaken, a sample size consistent with other exploratory studies in organisational and policy research, where smaller samples are sufficient to achieve data saturation and generate in-depth insights (Guest, Bunce & Johnson, 2006; Saunders et al., 2019). Interviews are particularly valuable for probing perceptions and motivations (Kvale & Brinkmann, 2009), though they are resource-intensive and may not yield generalisable findings (Gill et al., 2008).

By combining these methods, the study benefits from both breadth and depth. Surveys capture systemic readiness across the sector, while interviews provide context-rich understandings of lived experience. This triangulation strengthens validity (Tashakkori & Teddlie, 2010), ensuring that findings are not only robust but also practically relevant to those tasked with advancing CWB in Northern Ireland. While mixed-methods research requires considerable resources and expertise (Bryman, 2007), its ability to integrate complementary forms of evidence makes it particularly well suited to studying a complex, evolving model such as CWB (Creswell & Plano Clark, 2017).

3.3 Justification of Research Methods Chosen

3.3.1 Methods Employed

Quantitative Online Survey

An online survey was designed to gather data from a wide sample of individuals involved in community, voluntary, and social enterprise organisations (Appendix 1). The survey included a combination of open and closed questions, multiple-choice items, Likert scales (1–5), and attitude-based measures. Ranking questions were deliberately excluded due to potential confusion for respondents. The survey instrument was non-validated and specifically developed for this study. Prior to launch, the online survey was piloted to identify and resolve any issues, and feedback was incorporated to improve clarity and overall effectiveness. While validated instruments offer consistency (Saunders et al., 2019, no existing tool addressed the sector's readiness for CWB implementation. Developing a tailored questionnaire allowed the study to address its specific objectives, although generalisability is limited to the sampled population.

The survey was launched on 8th August and remained open until 10th September. It was disseminated through a combination of personal networks and social media platforms, including LinkedIn, X, Facebook, and Instagram, potentially reaching an audience of over 42,000 contacts. In addition, the survey was circulated via sectoral organisations such as Social Enterprise NI, Northern Ireland Council for Voluntary Action (NICVA), Neighbourhood Partnership Boards, Impact NI, and the two pilot CWB

projects in the North West and Larne. To enhance participation, direct engagement with key personnel was also undertaken (Appendix 2). As initial response rates were slower than anticipated, an additional outreach strategy was implemented during the final week of the survey in collaboration with an online influencer, whose platforms helped to broaden visibility. This final push proved effective, resulting in a notable increase in responses during that period.

The survey offered several key advantages. It was cost-effective and time-efficient, allowing for rapid data collection across a wide and geographically dispersed sample. The standardised format ensured consistency in responses, facilitating comparative analysis and reducing the potential for measurement bias. Anonymity was maintained, encouraging participants to provide candid and honest feedback, particularly on sensitive or evaluative topics. Additionally, the survey was designed to be compatible with analytical tools such as Microsoft Teams and NVivo, enabling efficient data management, coding, and thematic analysis. Beyond these practical benefits, the online format increased accessibility for participants, allowing them to complete the survey at a convenient time and location, thereby maximising engagement and response rates. Collectively, these factors made the survey a highly suitable instrument for capturing sector-wide perspectives on Community Wealth Building readiness in Northern Ireland.

Qualitative One-to-One Interviews

To complement the survey data, semi-structured interviews were conducted with key stakeholders across the CVSE sector. In order to participate in the interviews, individuals needed to meet specific inclusion criteria: participants had to hold a position of strategic or operational responsibility within their organisation, possess direct experience of Community Wealth Building initiatives, or have demonstrable expertise in local economic development or social enterprise governance. This ensured that the data collected were informed by participants with sufficient knowledge and experience to provide valid and credible insights (Patton, 2015; Kvale & Brinkmann, 2009).

A total of ten one-to-one interviews were conducted with individuals actively involved in shaping or implementing Community Wealth Building in Northern Ireland. Participants included CEOs, board members, directors of community planning organisations, senior leaders from national CWB bodies, policy advisors, frontline practitioners, and international CWB experts. This purposive sampling approach was deliberately used to select participants who could be considered experts within their respective domains, recognising that expert witnesses are valued in research for the reliability and depth of their responses (Robson, 2011; Guest, Bunce & Johnson, 2006). By engaging participants with recognised expertise, the study was able to capture authoritative perspectives on both strategic decision-making and operational implementation, increasing the credibility and trustworthiness of the findings.

Interviews allowed participants to express their views in their own words, providing rich, contextual insights that could not be captured through surveys alone. Questions were developed in advance (Appendix 3), piloted with a small number of participants, and refined to ensure clarity and relevance. To maintain ethical standards, all participants received research outlines and consent forms prior to the interviews (Appendix 4). Confidentiality was ensured through anonymisation, with participants referred to using codes (P1–P10). The diverse composition of the sample, encompassing strategic, operational, policy, and grassroots perspectives, provided a comprehensive understanding of sectoral readiness and the practical realities of implementing CWB initiatives across Northern Ireland.

Participant Code	Role / Organisation (Descriptive)	Rationale for Inclusion
P1	Senior Leader, National CWB Organisation	Provides strategic insight into national CWB approaches and international best practices.
P2	Board Member, Urban Regeneration & Social Enterprise	Offers dual perspective on governance and localised CWB implementation.
P3	CEO, Regional CWB Pilot Project	Brings operational experience from pilot CWB initiatives in Northern Ireland.
P4	Director, Community Planning Organisation	Provides insights into community engagement and participatory economic development.
P5	Local Government Officer	Offers perspective on policy implementation, procurement, and local authority support.
P6	Chair, Regional CWB Initiative	Provides insight into cross-sector collaboration and leadership in CWB delivery.
P7	Project Worker, Community Organisation	Offers a frontline perspective on how CWB is experienced at the community level.
P8	International CWB Expert	Contributes comparative, global perspective on best practices and policy lessons.
P9	Policy Advisor, Pilot CWB Project	Provides insight into neighbourhood-level implementation and coordination.
P10	Government Minister	Offers high-level perspective on regional economic strategy and CWB alignment.

Table 2: Anonymised Individual Participant Interviews

3.3.2 Justification of Methods

The adoption of a mixed-methods approach was considered the most suitable strategy for addressing the research objectives and capturing the complexity of Community Wealth Building within the Northern Irish social enterprise and community and voluntary sectors. This methodological approach offered several key advantages.

The combination of quantitative and qualitative methods allowed the study to capture both breadth and depth. Quantitative surveys provided a sector-wide overview, revealing patterns, trends, and general perceptions regarding readiness for CWB adoption. In contrast, qualitative one-to-one interviews and focus groups offered rich, nuanced insights into the experiences, motivations, and reasoning of stakeholders at multiple levels, from volunteers and frontline practitioners to CEOs and policymakers. While the one-to-one interviews focused specifically on participants with a deep understanding of CWB and its implementation, the survey enabled wider participation across Northern Ireland, including areas where CWB has not yet been piloted. This allowed the research to capture not only levels of engagement but also the awareness, or lack thereof, of CWB principles across the region, providing a more comprehensive picture of sectoral readiness.

Guided by a pragmatist philosophy, the research prioritised flexibility and utility, allowing methods to be tailored to the research problem rather than constrained by rigid theoretical commitments. The pragmatic stance enabled the researcher to select and combine methods that were most effective for answering the research questions, addressing both quantitative indicators of readiness and qualitative narratives on sectoral capacity, collaboration, and perceived barriers. Employing multiple methods enhanced the credibility and reliability of the findings. Triangulation across surveys and interviews allowed for cross-validation of data, reducing potential biases and providing a more robust understanding of the sector. By integrating multiple perspectives, from policy designers to operational implementers, the research captured a holistic view of sectoral readiness, capacity constraints, and the feasibility of collective impact approaches. This multi-layered perspective was particularly valuable in identifying

barriers to implementation, differences in stakeholder perceptions, and opportunities to strengthen collaboration across organisational levels.

Furthermore, this mixed-methods design enabled the exploration of complex, interrelated themes, including organisational capacity, collaborative networks, stakeholder engagement, and sector-wide perceptions of CWB principles. By combining methods, the study could assess both the structural and cultural dimensions of readiness, providing insights that are actionable for policymakers, practitioners, and community leaders. In essence, the methodology ensured that the research outcomes were not only statistically informative but also contextually grounded, practically relevant, and capable of informing strategic decisions to advance sustainable and inclusive economic growth through CWB initiatives in Northern Ireland.

3.3.3 Research Procedures

The research followed a systematic and carefully planned sequence of procedures to ensure methodological rigor, transparency, and alignment with the research objectives. The overall process was designed to integrate both quantitative and qualitative strands effectively, maximising the depth and breadth of data collected while maintaining ethical standards. The sequence of research procedures is outlined below:

Table 3: Research procedures

A customised online questionnaire was designed specifically for this study, tailored to explore sectoral readiness for Community Wealth Building, barriers to implementation, collaborative working, and stakeholder perceptions. The survey included a combination of open-ended and closed questions, Likert scales, and multiple-choice items to capture both qualitative opinions and quantitative trends(Appendix 1). Prior to launch, the survey was piloted with a small group of sector stakeholders to test question clarity, structure, and flow. Feedback from the pilot informed refinements to ensure the survey was accessible, comprehensible, and aligned with the research objectives. The survey was launched on 8th August and disseminated using a multi-pronged approach to reach a wide and diverse sample across Northern Ireland. To further increase participation, direct engagement with key personnel in these organisations was undertaken (Appendix 2). In the final week of the survey, additional outreach was conducted in collaboration with an online influencer, which significantly boosted response rates and ensured representation from areas where CWB had not yet been piloted, capturing awareness levels across the region. The survey remained open until 10th September, providing participants with ample time to respond while enabling timely data compilation and analysis. The cut-off date was chosen to balance the need for comprehensive data collection with the overall research timeline.

Following the survey, one-to-one interviews were conducted to gather in depth, contextual insights. Interviews targeted participants with extensive knowledge of CWB, including policymakers, sector leaders, and practitioners, allowing exploration of strategic, operational, and grassroots perspectives. All qualitative data collection was completed by 10th September, ensuring alignment with the survey closure and enabling integration of findings across methods. All data were stored securely on Microsoft OneDrive in accordance with General Data Protection Regulation(GDPR) requirements and Ulster University's retention policy for Masters-level research (7 years). No personal identifiers were collected in the survey, and all interview and focus group participants were anonymised. Consent forms and information sheets (Appendix 3)were provided to participants in advance, ensuring informed participation and adherence to ethical standards throughout the research process.

Upon completion of data collection, qualitative data were transcribed verbatim to facilitate thematic analysis. Survey responses were compiled, cleaned, and organised to allow descriptive statistical analysis and comparison across participant groups. Preliminary coding frameworks were developed to identify recurring themes and patterns, which were then refined during the full analysis phase. The integration of quantitative and qualitative datasets ensured that the study could triangulate findings, offering a comprehensive, multi-dimensional understanding of CWB readiness in Northern Ireland. By following this structured sequence, the research ensured methodological rigour, transparency, and reproducibility, while capturing a broad range of stakeholder perspectives and maintaining the highest standards of ethical practice.

3.4 Research Analysis

The analysis of the research data was undertaken using a structured and rigorous approach, ensuring alignment with the research objectives and providing both breadth and depth in understanding the sector's readiness for Community Wealth Building.

Quantitative Data Analysis

Data collected through the online survey were analysed using Microsoft Excel and its built-in functions for descriptive statistics. Excel enabled the calculation of frequency counts, percentages, and visual charts for multiple-choice and Likert-scale items, providing a clear overview of response distributions. Cross-tabulations were also conducted to explore relationships between participant characteristics such as organisational role, geographic location, and sector involvement and their perceptions of CWB readiness, collaborative practices, and capacity constraints. The use of Likert-scale responses allowed subjective attitudes to be quantified, generating measurable insights into stakeholder perceptions and experiences. By combining automated summaries with Excel-based statistical exploration, the analysis ensured a robust and accurate representation of sector-wide trends. For studies requiring more advanced statistical procedures, software such as SPSS can be employed to perform more complex analyses (Field, 2018; Saunders, Lewis & Thornhill, 2019).

Qualitative Data Analysis

Qualitative data from one-to-one interviews, focus groups, and open ended survey responses were transcribed verbatim and analysed thematically using NVivo software. Coding was applied both deductively, based on concepts identified in the literature, and inductively, allowing themes to emerge from the data itself (Thomas, 2006; Braun & Clarke, 2013). This approach ensured that the analysis captured theoretically grounded insights while remaining sensitive to participants' lived experiences and unexpected findings. Key themes identified included organisational capacity, barriers to implementation, stakeholder engagement, collaborative practices, and the potential for collective impact initiatives. Using NVivo facilitated systematic coding, theme development, and comparison across participants, enhancing the transparency and rigour of the qualitative analysis (Kvale & Brinkmann, 2009)

Reflexive notes were maintained throughout the qualitative analysis to document the researcher's observations, analytical decisions, and potential biases. This practice supported transparency and enhanced the credibility of interpretations by allowing the researcher to critically consider how their own perspectives might influence the analysis. Combining survey data with interviews allowed for triangulation, strengthening the reliability and validity of findings. The quantitative survey provided a broad overview of awareness and readiness levels across Northern Ireland, including areas where CWB has not yet been piloted, while the qualitative data offered deeper understanding of stakeholder motivations, challenges, and practical experiences. This integrated approach enabled a comprehensive, multi-dimensional assessment of the sector, identifying both measurable trends and the nuanced contextual factors necessary for successful CWB implementation.

3.5 Limitations of Research

Despite efforts to ensure methodological rigour, several limitations should be acknowledged. The survey received 82 responses, sufficient for exploratory analysis but representing only a small proportion of the Northern Ireland CVSE sector. Most

respondents were concentrated in Derry and Belfast/Larne, the sites of CWB pilots, limiting the representativeness of the findings and restricting generalisation to the wider sector. Data collection took place between August and September, a period marked by reduced organisational activity and staff leave, which constrained participation and diversity of responses and prevented longitudinal analysis, providing a snapshot rather than an evolving view of CWB readiness. The survey was designed to align with the research objectives but was not formally validated, meaning the reliability and generalisability of its measures remain uncertain. The researcher's professional experience in CWB offered valuable contextual understanding but may also have introduced bias, particularly in the interpretation of qualitative data. Reflexive practices and coding validation were employed to mitigate this risk, though it cannot be entirely eliminated. Recruitment relied heavily on professional networks, enabling access to key stakeholders but potentially introducing selection bias and excluding perspectives from less-connected organisations. Taken together, these limitations suggest that the findings are exploratory and contextually situated. Future research could enhance generalisability through larger, more diverse samples, extended data collection periods, and the use of validated instruments.

3.6 Conclusion

This chapter outlined the methodology for investigating Northern Ireland's readiness for Community Wealth Building, justifying a pragmatic mixed-methods approach and detailing survey and interview procedures. Limitations and ethical considerations were acknowledged. The next chapters present the findings, offering insights and recommendations to advance CWB in Northern Ireland.

CHAPTER FOUR: FINDINGS AND ANALYSIS

4.1 Introduction

This chapter presents the findings of the study and explores them through analytical discussion. Drawing upon both the sector-wide survey of 82 organisations and ten in-depth semi-structured interviews, the analysis captures how the community, voluntary, and social economy sector in Northern Ireland understands and engages with Community Wealth Building. The two data sources complement one another: the survey provides breadth and a quantitative picture of awareness, barriers, and readiness, while the interviews add depth, nuance, and lived accounts of how CWB is experienced in practice.

The chapter is structured around three themes which emerged strongly from the data. The first concerns the growth of awareness but uneven depth of understanding of CWB across the sector. The second explores the barriers that organisations face when attempting to embed CWB principles in practice. The third considers readiness and the extent to which the social sector feels capable of moving from aspiration to implementation. Each theme is developed beginning with findings before moving to analysis that situates the results within the wider literature on CWB, inclusive economic development, and the role of the third sector. The chapter concludes with a summary of the key findings, drawing together the themes and reflecting on their significance in the Northern Ireland context. The final section briefly restates the main progression of findings and signals how these insights will inform the discussion, conclusions, and recommendations in Chapter Five.

4.2 Profile of Respondents

The profile of respondents is essential for contextualising the findings. A total of 82 organisations participated in the survey, representing a broad cross-section of the CVSE sector. The largest single group were charities, who accounted for over half of all responses. This strong representation reflects the enduring dominance of the

charitable model in Northern Ireland's third sector, and it also points to the central role that charities are playing in current debates around CWB. Social enterprises formed the second largest grouping, while smaller proportions of community interest companies, other not-for-profits, and a single co-operative completed the sample. This spread highlights both diversity and imbalance, with the charity sector clearly the loudest institutional voice within CWB conversations.

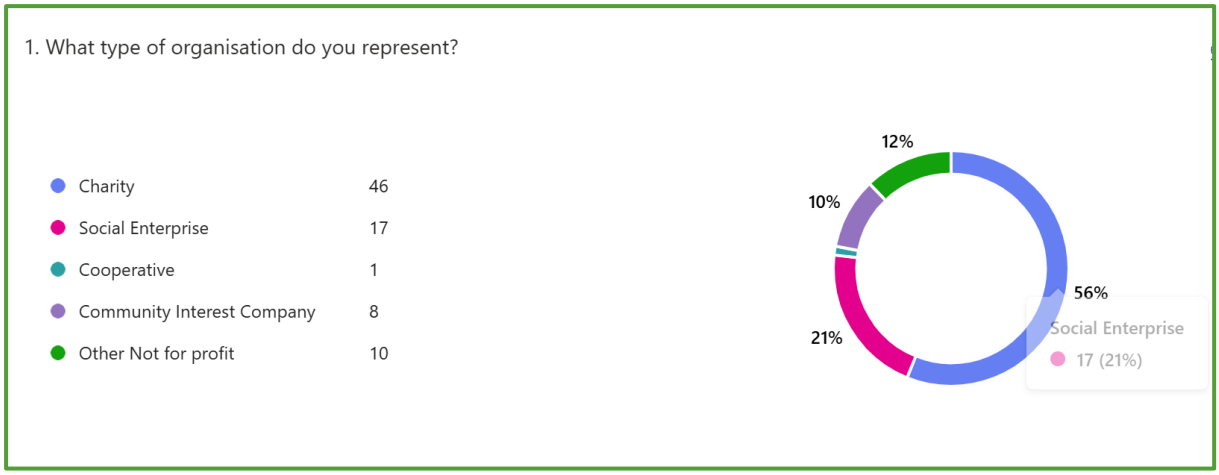


Table 4: Types of organisations

Organisational longevity was another striking feature of the sample. Out of the 82 organisations surveyed, 54 had been operating for more than a decade, representing nearly two-thirds of all respondents. A further 17 reported being in existence between four and ten years, while seven were relatively young organisations that had been active for fewer than three years. Only one organisation described itself as newly established within the past year. This distribution highlights that CWB conversations are being taken up primarily by organisations with an established presence and a long track record of delivering social and economic value, rather than by new or emerging actors.

Table 5: Organisational Longevity

Roles within organisations also varied widely, capturing perspectives across the hierarchy. Thirty two respondents occupied senior leadership positions, including chief executives, directors, and senior managers. These were joined by 18 participants who identified as project officers or coordinators, 12 board members, and 20 volunteers or support staff. This spread ensured that both strategic and operational viewpoints were represented, offering insights into how CWB is understood at different levels of organisational responsibility. Notably, the data suggests that senior leaders tend to report higher levels of familiarity with CWB compared to project staff and volunteers, a pattern explored in later sections. This finding indicates that engagement with CWB is unevenly distributed across organisational layers.

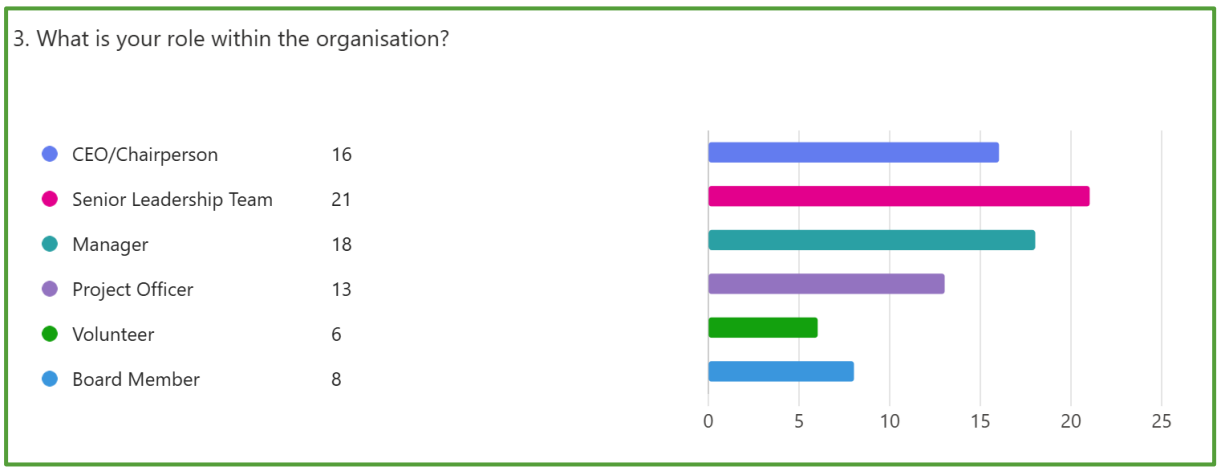


Table 6: Roles within organisations

Organisational size also reflected a balanced mix of small, medium, and larger entities. Twenty-one respondents came from small organisations employing fewer than ten staff, accounting for just over a quarter of the total. Thirty-four represented medium-sized organisations with between eleven and fifty employees, while nine respondents reported belonging to large organisations employing more than one hundred staff. The remainder, 18 in total, worked in organisations with between fifty-one and one hundred employees. This diversity is significant because it shows that both grassroots community organisations and larger anchor-type organisations are beginning to engage with CWB, offering scope for collaboration across different scales of operation.

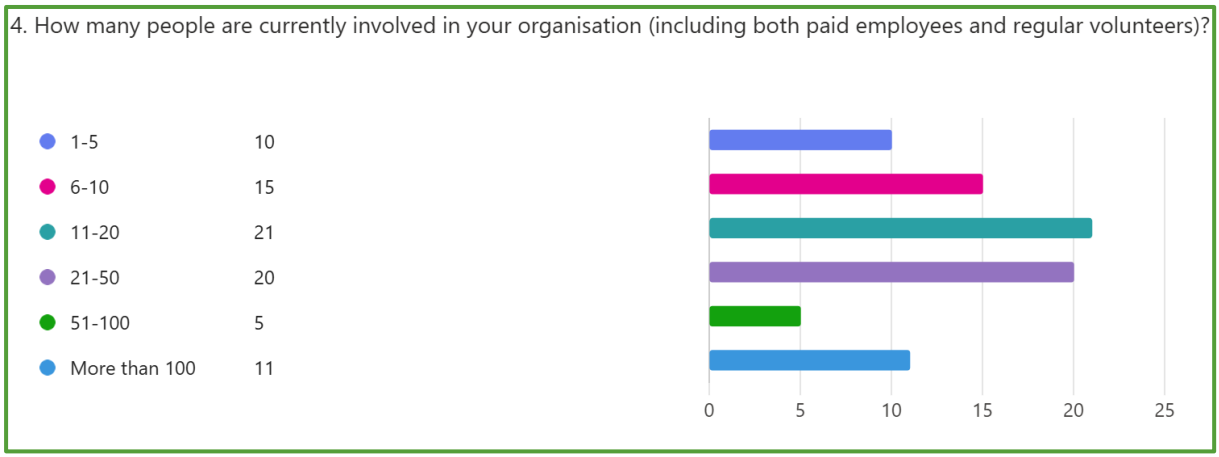


Table 7: Size of organisations

Geographically, the distribution of respondents revealed both concentration and diversity. Thirty-five organisations were based in Derry, 22 in Belfast, and the remaining 25 were spread across rural counties including Tyrone, Armagh, Down, and Fermanagh. The particularly strong representation from Derry reflects the fact that a CWB pilot initiative has been active in the city for two years, raising awareness and encouraging local organisations to participate in this research. At the same time, the inclusion of respondents from other urban centres and rural regions ensures that the findings capture a broad spectrum of experiences and challenges across Northern Ireland.

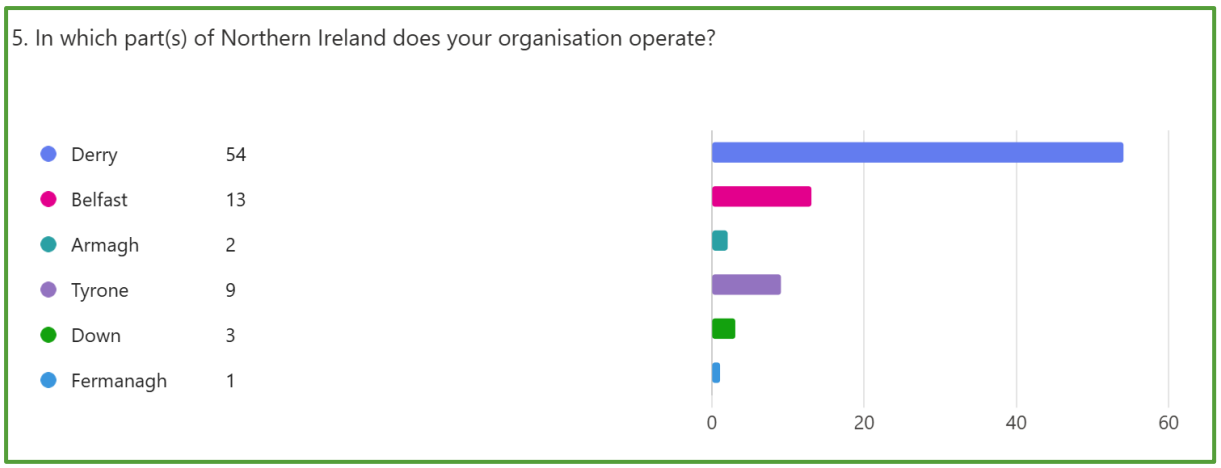


Table 8: Location of organisations

To complement the survey, ten semi-structured interviews were conducted with individuals occupying key positions across the CWB landscape. The sample included senior leaders such as chief executives and board members, policymakers and local government officers, a frontline project worker, a government minister, and an international expert. This diversity was intentional, ensuring that the research would capture insights from multiple perspectives and levels of involvement. Senior leaders and policymakers were able to reflect on strategy and institutional frameworks, while practitioners and grassroots actors described how CWB is experienced on the ground. The international perspective added a valuable comparative element, situating Northern Ireland's engagement within wider global efforts to promote inclusive economic development. Appendix 3 contains a sample of the semi-structured interview questions utilised in this study

The combination of survey and interview data provides both scale and depth. While the survey identifies sector-wide trends and patterns, the interviews bring these patterns to life through personal accounts, challenges, and reflections. This dual approach strengthens the reliability and richness of the findings.

4.3 Growing Awareness but Uneven Understanding of CWB

The first theme to emerge from the data concerns awareness and understanding of CWB. Findings suggest that awareness has grown rapidly in recent years, particularly in the last eighteen months. Many organisations reported recognising that aspects of their existing work already align with the principles of CWB. Several interviewees described the framework as something of a retrospective label for long-standing practices in local development. They pointed out that community-led regeneration, social enterprise development, and local service delivery have always been central to their mission, even if these activities were not previously named as CWB. One interviewee (P5), observed that their organisation had "been doing CWB without calling it that for a long time." For them, the value of the CWB framework was in providing coherence and political traction, giving a name and structure to work that might otherwise remain fragmented or undervalued. Another policymaker noted that CWB has become "politically fashionable," (P9) yet the challenge remains one of ensuring that this popularity translates into consistent and practical action across departments and regions.

The survey data reinforced this sense of uneven engagement. The average reported understanding of CWB across all respondents was modest, at 3.2 on a five-point scale. However, this mean conceals variation. In Derry, where a pilot initiative has been underway, levels of awareness were notably higher. In other areas, particularly rural counties, the average fell closer to 2.2. This suggests that direct exposure to initiatives is more influential than geography itself in shaping understanding.

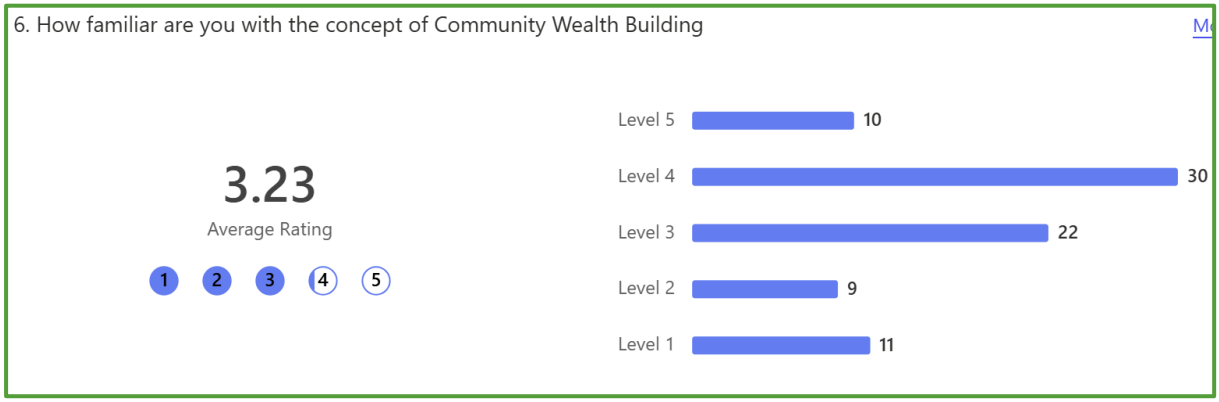


Table 9: Familiarity of the concept of CWB

Differences were also apparent across organisational roles. Those in leadership positions reported far higher levels of familiarity compared to those in operational roles such as project officers and volunteers, see Table 6. The interviews confirmed this picture, with leaders able to describe the five pillars of CWB and articulate its connections to procurement reform and place-based development, while frontline staff often spoke in broader aspirational terms. The stratification of knowledge within organisations highlights a potential risk: while leadership may be convinced of CWB's value, frontline staff may not yet fully grasp how it relates to their daily practice.

The literature on policy diffusion provides a useful lens for interpreting these findings. New frameworks often take hold at the level of discourse and leadership before becoming embedded at the operational level. Peck (2019) and Kelly and McKinley (2021) both note that inclusive economy initiatives are frequently understood unevenly, with leaders adopting the rhetoric while staff struggle to apply it in practice. In Northern Ireland, this appears to be playing out in the same way.

The analysis therefore suggests a dual reality. On the one hand, CWB is gaining recognition and political traction, offering the sector a useful language and framework. On the other hand, understanding remains uneven, particularly among smaller organisations and frontline practitioners. Unless this gap is addressed through training and awareness-raising, there is a risk that CWB will remain a leadership discourse rather than a genuinely embedded practice.

4.4 Barriers Facing Organisations in Implementing CWB

The second theme concerns the barriers that organisations encounter when attempting to move from awareness to implementation while the sector demonstrates strong willingness, this willingness is constrained by a series of obstacles that are both structural and organisational in nature. Funding emerged as the most consistent challenge. More than half of survey respondents identified lack of financial resources as a barrier. Many organisations described themselves as being stuck in survival mode, reliant on insecure project-based funding and unable to plan strategically. This was

echoed in interviews, where several participants spoke of the daily struggle to sustain core services. One project worker explained that their organisation would like to explore CWB opportunities, but with limited staff and stretched resources, strategic thinking often becomes a luxury they cannot afford.

Staffing capacity was a related issue, highlighted by nearly as many respondents as funding. Many organisations operate with small teams where individuals wear multiple hats. In such contexts, engaging with procurement reform, developing partnerships with government departments, or planning long-term economic interventions is extremely difficult. The interviews reinforced this point, with one local government officer remarking that some organisations *"barely have the staff to deliver existing services, let alone to engage in new frameworks*. (P5)".

Knowledge and training gaps were also significant. Forty survey respondents reported insufficient understanding of CWB as a barrier, and interviewees consistently stressed that awareness without operational tools leads to frustration. A senior leader reflected that some organisations are already well placed to act, while others require substantial support to develop even a basic readiness. This unevenness suggests that capacity-building interventions will need to be tailored rather than generic.

Policy and political support was another area of concern. Respondents described council support as patchy and inconsistent, while others noted a disconnect between high-level political endorsement of inclusive economic development and its delivery on the ground. Procurement processes were particularly criticised for favouring larger organisations, with limited enforcement of social value commitments. Several interviewees expressed frustration that despite rhetoric around social value, in practice contracts often went to the lowest bidder with little monitoring of outcomes (P1, P2, P3.P4, P6).

Some barriers were less frequently mentioned but nonetheless important. A small number of respondents cited lack of local demand, but interviews pointed instead to a deeper cultural resistance (P6, P8)). Entrenched attitudes within both government and business were described as undervaluing the role of the social sector in economic life. This cultural dimension is more difficult to address but may be just as critical as

financial or regulatory obstacles "*I think culture is a huge barrier. I think changing mindsets of how things can be done and how things work is really difficult work, right?... So that culture shift... is a big barrier and it's a big bucket cause that takes time cause that's about literal individual mindset shifts.".*(P8)

When asked what supports would enable greater engagement, respondents consistently pointed to the need for leadership and skills development, particularly in commercial and strategic areas. Many organisations feel unprepared to compete for procurement opportunities or to negotiate effectively with government departments. Interviewees also called for structured awareness-raising campaigns, not only within the sector but also among public officials, arguing that procurement officers and policymakers need training to understand and value CWB. Access to finance was another recurring theme. Organisations stressed the lack of affordable funding for capital growth or impact-linked financial products that would allow them to build long-term capacity. Without such financial instruments, many remain locked into short-term project cycles that undermine sustainability.

Table 10: Barriers to implementing CWB

Finally, institutional support was seen as essential. Several interviewees argued that CWB should be explicitly embedded in the Programme for Government to ensure consistent political attention, while others proposed establishing an independent body to monitor social value delivery. The provision of practical resources such as toolkits for councils and communities was also suggested, alongside dedicated capacity-building

programmes. *"I think first and foremost, like a lot of things in Northern Ireland, we've got to have that cross departmental, cross political buy-in because without that things don't necessarily progress really well. I think one of the things that would assist in that... is to have community wealth building specifically mentioned in the Programme for Government."* (P3).

Taken together, these findings paint a picture of high willingness but constrained capacity. The barriers are both internal, such as lack of skills and staff, and external, such as inadequate policy frameworks and funding. Without targeted support, engagement with CWB risks remaining tokenistic, echoing concerns raised in the wider literature about the challenges of embedding systemic change in resource-constrained environments.

4.6 Readiness of the Social Sector: Pockets of Strength Amid Structural Weaknesses

The final theme concerns the readiness of the social sector to engage with CWB. While barriers are significant, the research also highlights areas of strength and optimism. Overall, survey respondents reported an average readiness of 3.5, suggesting a moderate degree of preparedness. Most organisations placed themselves in the mid to high range of the scale, indicating that they felt at least somewhat ready to engage with CWB. However, a smaller group of fourteen organisations reported low readiness, and these were generally the same organisations that also reported low awareness. This reinforces the strong connection between knowledge and confidence.

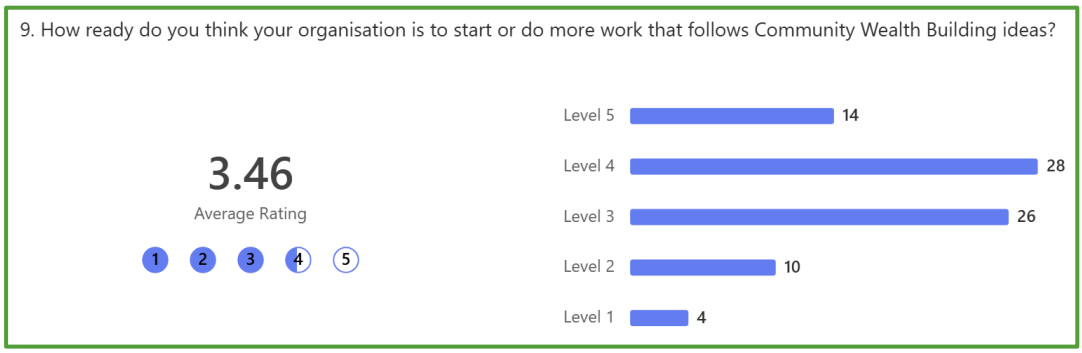


Table 11: Perceived Readiness of organisations

The interviews provided a more textured picture. Participants frequently described the Northwest region, and Derry in particular, as an area of relative strength. The presence of a pilot initiative has fostered greater collaboration, higher levels of awareness, and a sense of shared purpose. Elsewhere, however, the landscape was described as patchy, with many smaller organisations struggling to move beyond survival mode. One interviewee noted that *"willingness is high, but the capacity is not evenly spread,"* (P1), highlighting the uneven geography of readiness.

Three gaps emerged consistently from both the survey and interviews. First, leadership and commercial acumen remain limited. Many organisations lack the skills to engage with procurement processes, negotiate partnerships with public bodies, or build sustainable income streams (P2, P3, P5, P6, P8). Second, access to finance continues to be a critical obstacle. Without growth capital or patient investment, organisations are unable to build the infrastructure and skills required for long-term engagement. (P2 P3, P8) Third, confidence and legitimacy are uneven. Smaller organisations, in particular, expressed concern that CWB might become dominated by larger players, leaving them marginalised or included only tokenistically. As P7 warned, wealth could *"fall into the hands of those that already had,"* since larger, well-resourced organisations are often better positioned to present themselves as delivery partners than smaller community actors.

Some participants highlighted the potential for capacity-building through collaboration with private sector actors. One noted the promise of private–social partnerships to provide a *"fast-track"* to commercial competence. As P3 explained: *"The private sector has a huge role to play in this. If we can create the conditions where private businesses are encouraged, or even required, to work alongside social enterprises and community organisations, then you're not only supporting those groups but also building a stronger local economy. That's where the wealth gets circulated rather than extracted."* However, others were more sceptical, warning that without adequate resourcing, such partnerships could entrench inequalities rather than resolve them.

The overall picture is one of high willingness but uneven readiness. Organisations are enthusiastic about the potential of CWB and recognise its importance to their future, but they are not uniformly equipped to act. Stronger examples of readiness exist in

regions and organisations, but structural weaknesses such as underfunding, skills gaps, and lack of institutional support persist across the sector. These findings resonate with broader debates in the literature which caution that enthusiasm alone cannot deliver systemic change without enabling conditions.

4.7 Summary of Key Findings

The findings of this chapter can be summarised around three interrelated insights. First, awareness of CWB has grown significantly but remains uneven. Many organisations recognise that their long-standing activities align with CWB principles, but a detailed understanding of the framework is often confined to senior leaders. Frontline staff, volunteers, and smaller organisations are less likely to be familiar with the concepts, creating a risk that CWB becomes a leadership discourse without operational depth.

Second, barriers to implementation are substantial. Organisations are constrained by chronic underfunding, staff shortages, and limited skills in commercial and strategic areas. These internal challenges are compounded by external obstacles including inconsistent political support, inadequate policy frameworks, and procurement processes that disadvantage smaller organisations. Cultural attitudes that undervalue the social sector also remain a subtle but important constraint. Despite these challenges, respondents identified clear forms of support that could help, including capacity-building, awareness-raising, access to finance, and stronger policies and regulations.

Third, readiness is uneven but not absent. The sector as a whole demonstrates strong willingness to engage with CWB, and there are examples of higher readiness in regions where pilot initiatives have taken place. However, this readiness is not uniform. Smaller organisations and those with less exposure to CWB report lower levels of confidence and preparedness. Without targeted interventions, these disparities risk deepening inequalities within the sector. Together, these findings suggest that CWB in Northern Ireland is at a critical juncture. Awareness has grown and political traction is increasing, but without sustained support, the sector's ability to translate aspiration

into action remains limited. The findings align with international literature that highlights the resource and institutional barriers to embedding CWB, while also revealing distinctive features of the Northern Ireland context, such as the influence of pilot projects, the dominance of the charity model, and the persistence of political fragmentation.

4.8 Conclusion

This chapter presented the research findings and related them to wider debates on CWB and the third sector. Three central themes emerged: growing awareness but uneven understanding, barriers to implementation, and uneven sector readiness. While the sector shows enthusiasm, financial, organisational, and political constraints persist, and success will depend on internal capacity-building and external support. The Northern Ireland context adds unique dynamics, including pilot projects, the resilience of the charity sector, and political fragmentation. These insights set the stage for Chapter Five, which explores the implications for CWB policy and practice.

CHAPTER FIVE: DISCUSSION AND CONCLUSION

5.1 Overall Solution to Research Objectives

This study was structured around three core objectives: first, to examine the extent of awareness and understanding of CWB within Northern Ireland's CVSE sector; second, to identify and analyse the barriers that constrain organisations in embedding CWB principles in practice; and third, to assess the sector's readiness to operationalise CWB and to consider the enabling conditions required for transition from aspiration to implementation.

These objectives were framed against a growing body of scholarship on CWB and inclusive economic development, which identifies uneven diffusion of awareness (O'Neill & Guinan, 2019), persistent structural barriers to adoption (Bentham et al., 2019), and the importance of institutional frameworks in embedding systemic change (Cumbers, 2020). While international evidence is beginning to illustrate how CWB principles are being adopted in diverse contexts, empirical research remains limited, particularly within regions characterised by political fragmentation and underdeveloped institutional infrastructures such as Northern Ireland. By drawing on survey and interview data, this study tested and extended these themes in a novel setting. The analysis in Chapter Four not only confirmed many of the concerns raised in the literature but also revealed distinctive local dynamics. This positions the research as a key contribution to an underexplored field. The following sub-sections set out the conclusions in relation to each research objective, alongside recommendations for practice and policy.

5.2.1 Conclusion on Awareness and Understanding of CWB (Research Objective 1)

The study concludes that awareness of CWB has grown significantly in Northern Ireland's CVSE sector, particularly in areas such as Derry where pilot initiatives have taken place. However, understanding remains uneven. Senior leaders demonstrate higher levels of familiarity with CWB's principles and discourse, while frontline staff,

volunteers, and smaller organisations often lack detailed knowledge. This stratification of awareness risks consolidating CWB as a leadership-level rhetoric without fully embedding it into operational practice.

This finding aligns with research on policy diffusion, which consistently shows that frameworks are often first adopted at the strategic level before permeating everyday organisational practice (Rogers, 2003; Jessop, 2021). It also supports literature emphasising the importance of demonstration effects and local pilots in accelerating awareness (Cumbers et al., 2018). At the same time, the Northern Ireland case adds to existing knowledge by highlighting how fragile institutional contexts amplify this stratification, making operationalisation especially difficult without deliberate knowledge-transfer mechanisms.

Recommendation: To prevent CWB from becoming a rhetorical framework, targeted training and capacity-building initiatives should be implemented at all organisational levels. Awareness efforts should extend beyond the CVSE sector to include local councils, procurement officers, and policymakers, ensuring shared understanding across the ecosystem.

5.2.2 Conclusion on Barriers to Implementation (Research Objective 2)

The study also finds that willingness to adopt CWB is strong, yet implementation is constrained by structural and organisational barriers. Chronic underfunding, insecure project-based finance, and limited staffing capacity leave many organisations operating in *"survival mode,"* (P5) , unable to plan strategically or compete for procurement opportunities. In addition, knowledge and skills gaps—particularly in commercial acumen and partnership-building, limit the sector's ability to operationalise CWB. Externally, inconsistent political support and procurement systems that favour larger providers exacerbate these challenges.

These findings resonate strongly with international literature that identifies financial precarity and institutional weakness as common barriers to embedding inclusive economic frameworks (North & Nurse, 2021; McInroy, 2022). However, this study extends existing debates by demonstrating how these barriers interact with Northern

Ireland's specific political and institutional context, where fragmentation and the resilience of the charitable model create additional hurdles.

Recommendation: Addressing these challenges requires multi-pronged interventions, including the introduction of stable multi-year funding, tailored skills development programmes, and procurement reforms that genuinely embed social value. Embedding CWB in the Programme for Government and establishing independent monitoring mechanisms would provide the institutional scaffolding needed for systemic change.

5.2.3 Conclusion on Readiness of the Sector (Research Objective 3)

The study concludes that readiness to operationalise CWB is characterised by enthusiasm but uneven capacity. While survey respondents indicated a moderate average level of readiness, regions with active pilots showed stronger preparedness. In contrast, smaller organisations, particularly those in rural areas, reported low readiness due to limited resources, awareness, and confidence. A recurring concern was that larger organisations might dominate CWB implementation, marginalising smaller actors. This conclusion reflects broader debates about uneven geography and scale in inclusive economic development (Jonas & Ward, 2019; Pike et al., 2020). It also reinforces the notion that readiness cannot be assumed but must be deliberately cultivated through enabling conditions—finance, skills, legitimacy, and institutional support (Bentham et al., 2019). The study contributes new knowledge by highlighting how these conditions manifest unevenly across Northern Ireland's distinct regional and political landscape, where history, scale, and institutional fragility shape organisational capacity.

Recommendation: Policymakers and funders should prioritise capacity-building tailored to organisational diversity. Mechanisms to ensure equitable participation of smaller organisations, such as consortia-based procurement or ring-fenced opportunities, should be explored. Expanding regional pilot programmes beyond Derry and Larne would further support readiness and foster collaboration across Northern Ireland.

5.3 Implications for Theory, Practice, and Policy

This study contributes to theory by confirming that diffusion of new economic frameworks such as CWB is rarely uniform. Leadership adoption often precedes operational embedding, underscoring the importance of intra-organisational knowledge transfer (Rogers, 2003). The research also extends theoretical debates on how global concepts interact with local political-economic contexts (Jessop, 2021), demonstrating how political fragmentation and resource scarcity shape the translation of inclusive economic models. In terms of practice, the findings underscore that while the CVSE sector is normatively aligned with CWB, operationalisation requires resources, training, and institutional scaffolding. This adds weight to literature suggesting that CWB must be deliberately cultivated rather than assumed to emerge organically (Cumbers, 2020; McInroy, 2022). For practitioners, the implications are clear: investment in commercial skills, procurement readiness, and leadership development is essential.

For policy, the findings demonstrate that rhetorical endorsement of CWB must be matched by enforceable institutional frameworks. Embedding CWB in the Programme for Government, reforming procurement to ensure social value is prioritised and measured, and establishing long-term funding mechanisms would create an enabling environment for systemic transformation. Without such reforms, CWB risks being marginalised as a voluntary, small-scale initiative rather than a structural shift.

5.4 Overall Solution to Research Objectives

This study was structured around three core objectives: first, to examine the extent of awareness and understanding of CWB within Northern Ireland's CVSE sector; second, to identify and analyse the barriers that constrain organisations in embedding CWB principles in practice; and third, to assess the sector's readiness to operationalise CWB and to consider the enabling conditions required for transition from aspiration to implementation. These objectives were framed against a growing body of scholarship on CWB and inclusive economic development, which identifies uneven diffusion of

awareness (O'Neill & Guinan, 2019), persistent structural barriers to adoption (Bentham et al., 2019), and the importance of institutional frameworks in embedding systemic change (Cumbers, 2020). While international evidence is beginning to illustrate how CWB principles are being adopted in diverse contexts, empirical research remains limited, particularly within regions characterised by political fragmentation and underdeveloped institutional infrastructures such as Northern Ireland. By drawing on survey and interview data, this study tested and extended these themes in a novel setting. The analysis in Chapter Four not only confirmed many of the concerns raised in the literature but also revealed distinctive local dynamics. This positions the research as a key contribution to an underexplored field. The following sub-sections set out the conclusions in relation to each research objective, alongside recommendations for practice and policy. At all organisational levels, awareness initiatives should transcend the CVSE sector to encompass local councils, procurement officers, and policymakers, thereby promoting a coherent and integrated understanding across the broader socio-economic ecosystem.

Advancement in knowledge

This study offers a novel contribution by presenting the first systematic analysis of CWB awareness, barriers, and readiness within Northern Ireland's CVSE sector. Existing research has largely concentrated on more stable metropolitan contexts, leaving a gap in understanding of how CWB takes root in regions marked by political fragmentation, financial precarity, and fragile governance structures. The findings reinforce established theories of diffusion and implementation but also extend them by showing how uneven institutional capacity and organisational diversity shape the trajectory of CWB in practice. In doing so, the research not only fills a critical empirical gap but also advances theoretical debates, providing a platform for future comparative inquiry in similarly constrained or fragmented settings.

5.4 Limitations and Future Study

This research is subject to several limitations. The study was conducted within a limited timeframe and with a modest sample size of 82 survey respondents and ten interviewees. While diverse, the sample cannot claim to capture the full spectrum of perspectives across Northern Ireland's CVSE sector. The researcher's position as a single investigator also shaped the scope and depth of the analysis. Future research could build on these findings by conducting larger-scale studies across different regions of the UK and Ireland, or by adopting longitudinal designs to track how awareness, barriers, and readiness evolve over time. Comparative studies with other post-conflict or politically fragmented contexts could also generate valuable insights into how CWB adapts to distinctive environments.

5.5 Conclusion

This dissertation explored how Northern Ireland's CVSE sector engages with Community Wealth Building, focusing on awareness, barriers, and readiness. Findings show growing but uneven awareness, significant structural barriers, and enthusiasm tempered by persistent weaknesses. The study highlights the need for targeted training, stable funding, procurement reform, and stronger institutional frameworks. It contributes to the literature by confirming known challenges while revealing Northern Ireland–specific dynamics, including pilot initiatives, the dominance of the charity model, and political fragmentation, providing a foundation for future policy and research on inclusive economic development.

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Appendix 1 QR Code Link to Survey

Appendix 2 Copy of Email sent for participation in survey

Dear colleagues,

I hope this message finds you well.

My name is Elisha McCallion, and I am currently undertaking an MSc at Ulster University. As part of my research, I am exploring *Community Wealth Building (CWB)* – an approach aimed at creating fairer, more local, and more sustainable economies.

To support this study, I am seeking the views of individuals involved in social enterprises, community organisations, and the voluntary sector in Northern Ireland. Their perspectives will provide valuable insight into how prepared the sector is to adopt this approach.

I would be very grateful if you could share my short survey (5–10 minutes to complete) with your networks, members, or colleagues who may wish to contribute.

🔗 Survey link: https://forms.office.com/e/gWf0wRV0ZW

Please note: the survey will remain open for the next **7 days**. All responses are confidential, and participation is entirely voluntary.

Thank you in advance for your support in sharing this request – your help will make a meaningful difference to the depth and quality of my research.

Best regards,
Elisha McCallion
MSc Student, Ulster University
📧 McCallion-E6@ulster.ac.uk

Appendix 3 Interview Protocol Ethics Statement and Questions

Interview Protocol

Study Title:
Community Wealth Building in Northern Ireland: Evaluating Readiness for a Transformational Enterprise Model through Global Best Practices

Researcher:
Elisha McCallion, PhD Candidate
Ulster University MSc International Business
Email: McCallion-e6@ulster.ac.uk

Date: Aug 2025

Interviewee Role:
(e.g. Local Government Official, Social Enterprise Leader, SME Owner)

Interview Introduction (to be read aloud):

Thank you for agreeing to take part in this interview. My name is Elisha McCallion, and I am conducting this research as part of my PhD project at UU. The purpose of this study is to explore how international best practices in Community Wealth Building might inform local economic development strategies in Northern Ireland, particularly through the role of social enterprises and local collaboration.

This interview will last approximately 30 minutes. With your permission, I would like to record our conversation so I can refer back to it later. All responses will be anonymised, and the data will be stored securely and used only for academic purposes. You are free to withdraw from the interview at any time or decline to answer any specific question.

Do you have any questions before we begin?
Do I have your consent to proceed and record the interview?

Interview Questions

- Understanding of CWB

1. How familiar are you with the concept of Community Wealth Building?
2. How do you define CWB within your role or organisation?

- Readiness & Capacity

3. How would you describe your organisation's (or sector's) current capacity to implement CWB practices?
4. What forms of support (funding, training, policy) are most needed?

- Barriers and Enablers

5. What challenges or limitations do you see in adopting a CWB approach in Northern Ireland?
6. Are there current initiatives that already align with CWB values?

- International Influence

7. Are you aware of any international examples of CWB that could inform practice here?
8. What elements of those models might be transferable?

- Role of Collaboration and Measurement

9. How important is inter-sector collaboration in advancing community wealth?
10. How would you suggest we measure the success of CWB initiatives in a meaningful way?

- Future Outlook

11. What would a successful CWB transformation look like in Northern Ireland?
12. What role do you see your organisation playing in this process?

Wrap-Up

13. Is there anything else you would like to add that we haven't covered?
14. Would you be willing to review a summary of the findings for validation?

Appendix 4 Ethics Statement Participant Information and Consent Form

Study Title: Community Wealth Building in Northern Ireland: Evaluating Readiness for a Transformational Enterprise Model through Global Best Practices

Researcher Contact:
Elisha McCallion
Ulster University MSc International Business

Email: McCallion-e6@ulster.ac.uk

Purpose of the Study

This research seeks to examine the feasibility and readiness of Northern Ireland to adopt Community Wealth Building (CWB) as a model for inclusive and sustainable local economic development. It will explore how international best practices may inform policy frameworks and social enterprise growth.

You are invited to take part in a voluntary, one-to-one interview or focus group. You are under no obligation to participate, and you may withdraw at any point without consequence.

Confidentiality

All responses will be kept strictly confidential. Your name or any identifiable information will not appear in the final research report or any publications. Data will be securely stored in compliance with [University's Data Protection Policy] and GDPR regulations.

Recording and Data Use

With your consent, interviews/focus groups will be audio-recorded for accuracy. Transcripts will be anonymised. Only the researcher and supervisor will have access to this data, which will be stored securely and destroyed after 7 years, as per policy.

Benefits and Risks

There are no anticipated risks from participating. Your insights will contribute to understanding how CWB strategies can be tailored for the Northern Ireland context.

Consent Statement:

By participating, you confirm that:
- You have read and understood the information provided.
- You understand your rights, including voluntary participation and the ability to withdraw at any time.
- You consent to the recording and anonymised use of your data for academic purposes.

Signed: _____

Date: _____

Researcher Signature: _____