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ARTÍCULOS

Desafíos de gestión y jurídicos del emprendimiento social en Portugal

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ES **Resumen.** El emprendimiento social se ha consolidado como un instrumento relevante para responder a desafíos sociales complejos, integrando innovación, impacto social y sostenibilidad económica. En Portugal, como en muchos otros países, este sector ha crecido mediante la creación de organizaciones con fines sociales que a menudo operan en contextos vulnerables y con recursos limitados. Sin embargo, los emprendedores sociales enfrentan desafíos significativos, particularmente en términos de gestión organizativa y adecuación del marco legal para sus iniciativas. Las ambigüedades en las esferas política, legal y organizativa generan dificultades en la ejecución de sus actividades.
Esta investigación tiene como objetivo identificar y analizar los principales desafíos legales y de gestión que enfrentan los emprendedores sociales en Portugal. Basándose en un marco teórico multidisciplinario que integra la perspectiva basada en recursos, la teoría de los *stakeholders* y el análisis de la estructura legal, el estudio presenta una revisión crítica del estado actual del emprendimiento social en Portugal. La literatura revela vacíos en la medición del desempeño, los mecanismos de financiación y la adaptabilidad de las formas legales para acoger modelos de negocio híbridos. A través del análisis de programas existentes y evidencia empírica de investigaciones nacionales e internacionales, el artículo identifica las debilidades estructurales del ecosistema de apoyo vigente.
Para alcanzar los objetivos de la investigación, se adoptó una metodología cualitativa, concretamente la realización de un grupo focal.
Los hallazgos señalan la necesidad urgente de reformas que mejoren la claridad legal, faciliten el acceso a fuentes de financiación diversificadas y promuevan estrategias de fortalecimiento de capacidades adaptadas a las especificidades de las empresas sociales. Se destaca la descoordinación entre la naturaleza innovadora y colectiva del emprendimiento social y la rigidez de los marcos legales y financieros existentes. Además, el estudio subraya la importancia de integrar prácticas sólidas de medición de impacto y alfabetización financiera en el desarrollo estratégico de estas iniciativas.
El estudio contribuye a un mayor entendimiento del ecosistema portugués de emprendimiento social y ofrece información práctica para orientar futuras políticas, investigaciones académicas y el desarrollo estratégico de empresas sociales.
Palabras clave. Emprendimiento social, emprendedor social, gestión, régimen jurídico, Portugal.
Claves Econlit. L31, M1, K2.

ENG Management and legal challenges for social entrepreneurship in Portugal

ENG **Abstract.** Social entrepreneurship has established itself as a relevant instrument in the response to complex social challenges, integrating innovation, social impact and economic sustainability. In Portugal, as in many other countries, this sector has grown through the creation of social purpose organisations that often operate in vulnerable contexts and with limited resources. However, social entrepreneurs face significant challenges, particularly in terms of organisational management and the adequacy of the legal framework for their initiatives. Ambiguities in the political, legal and organisational spheres lead to difficulties in carrying out their activities.
This research aims to identify and analyse the main legal and management challenges faced by social entrepreneurs in Portugal. Drawing on a multidisciplinary theoretical framework that integrates the resource-based view, stakeholder theory, and legal structure analysis, the study presents a critical review of the current state of social entrepreneurship in Portugal. The literature reveals gaps in performance measurement, funding mechanisms, and the adaptability of legal forms to accommodate hybrid business models. Through the analysis of existing programmes and empirical evidence from national and international research, the article identifies the

structural weaknesses of the current support ecosystem.
To achieve the research goals a qualitative research methodology was adopted to conduct the study, namely the focus group.
The findings point to the urgent need for reforms that enhance legal clarity, improve access to diversified funding sources, and promote capacity-building strategies tailored to the specificities of social enterprises. Emphasis is placed on the mismatch between the innovative and collective nature of social entrepreneurship and the rigidity of existing legal and financial frameworks. Furthermore, the study highlights the importance of integrating robust impact measurement practices and financial literacy into the strategic development of these ventures.
The study contributes to a deeper understanding of the Portuguese social entrepreneurship ecosystem and offers actionable insights to inform future policy, academic research, and the strategic development of social ventures.
Keywords. Social Entrepreneurship, Social entrepreneur, Management, Legal regime, Portugal.

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1. Introduction

Social entrepreneurship (SE) has emerged as a vital area for developing socially and environmentally sustainable solutions, that combine innovation, social impact and economic sustainability (Defourny & Nyssens, 2010; Santos, 2012). It is crucial to recognise that SE transcends the boundaries of traditional entrepreneurship and has its own specificities. The intersection between social change and sustainable development determines the essence of SE, which, by its nature, operates to address social problems without disregarding economic viability (Mair & Martí, 2006). The impact of SE can be seen as an innovative response to existing gaps in social services that are often neglected by government and private sector entities (Cunha et al., 2015; Muhamad & Adham, 2013; Rhena et al., 2024).

In Portugal, this sector has seen significant growth, resulting in the creation of organisations operating in vulnerable contexts and with limited resources (Parente & Lopes, 2014). However, social entrepreneurs face considerable obstacles, especially regarding organisational management and adequacy of the legal framework for their initiatives (Dias, 2018; Parente & Lopes, 2014). In addition, the lack of a specific legal status for social enterprises contributes to legal ambiguity, making it difficult to access initiatives that adopt the legal form of a commercial company, tax benefits and compromising the sustainability of their activities (Bernardino & Santos, 2016; Oliveira et al., 2018).

Indeed, national, regional and local legislation and policies are seen as factors that have the power to enhance a social business's ability to scale and have a significant social impact, thus indicating that infrastructure and government support are critical to the success of SE (Bennett et al., 2019; Lukjanska et al., 2017; Pan & Muntean, 2021).

The challenges faced by social entrepreneurs in Portugal are multifaceted. Financial sustainability is a central concern, as these organisations need to generate sufficient resources to sustain their operations and expand their social impact (Oliveira et al., 2018; Souza, 2022). This often means relying on alternative sources of funding, such as donations, partnerships with non-governmental organisations (NGOs) or government support. Furthermore, scalability of impact represents another challenge, as adapting business models to different economic and political contexts requires careful approaches and collaboration between different organisations (Teasdale, 2012). Additionally, the legal framework for SE organisations in Portugal is diverse, including forms such as associations, cooperatives and foundations (The IT Factory, 2023; Souza, 2022). Each of these legal forms has specific characteristics that influence the operation and management of the organisations.

This research aims to identify and analyse the main legal and management challenges faced by social entrepreneurs in Portugal.

The paper is therefore structured into five sections. Section 2 presents a theoretical framework and the contextualisation of the problem. Section 3 describes the methodological approach and criteria for selecting the dimensions of the study. After that, Section 4 presents and analyses the results of the study. Finally, the main conclusions are presented.

2. Theoretical background

2.1. Origin and meaning of the concept of social entrepreneurship (SE)

The concept of SE began to emerge as a response to the perceived limitations of traditional business approaches and the almost non-existent role of governments in solving complex social problems (Griffiths et al., 2013; Sud et al., 2009). Historically, the roots of SE can be traced back to the 19th century, when pioneering figures such as Florence Nightingale began to apply business principles to address social needs (Lopyola & Oliveira, 2021). However, the consolidation of the term ‘social entrepreneurship’ was born more formally in the closing decades of the 20th century, when academics and professionals recognised the need for business models that prioritised both profits and positive social impact (Bansal et al., 2019).

In the 1980s and 1990s, the growth of the third sector and increased awareness of global social problems such as poverty, health, and education led to greater demand for innovative and sustainable solutions (Cordova

& Celone, 2019; Pansera & Sarkar, 2016; Kamaludin et al., 2021). The Global Entrepreneurship Monitor (GEM), an initiative that analyses entrepreneurial activity worldwide, has noted a growing attention to the intersection between entrepreneurship and social impact. The Organisation for Economic Co-operation and Development (OECD) studies have also highlighted that the search for social solutions, alongside financial success, has become a priority, not only in developing economies, but also in developed countries (OECD, 2022).

International bodies such as the European Union and the World Economic Forum began to incorporate discussions on SE into their respective agendas, recognising it as a key tool for promoting sustainable development and social inclusion. For example, the European Commission's 2011 report on SE highlighted the importance of initiatives that combine social objectives with revenue generation, emphasising the economic viability of social enterprises as a driver for growth and innovation (Howaldt et al., 2017).

The beginning of the 21st century witnessed an explosion in research into SE. Various authors explored the unique characteristics of social entrepreneurs, such as their values-based motivation, commitment to innovation and search for solutions that transcend profit (Adomako & Nguyen, 2024). This field has begun to incorporate elements of innovation, sustainability and social impact into a broader context, leading to a re-evaluation of traditional concepts of entrepreneurship.

With the advent of new technologies and globalisation, SE has continued to adapt and evolve. Digitalisation has enabled small social entrepreneurs to reach a global audience, using online platforms to mobilise resources and connect with communities (Wang, 2022). Case studies, such as the one by Subramanian et al. (2025) addressing successful initiatives in diverse contexts such as microfinance, have become part of the discussion, revealing how creative solutions can emerge in response to varied social challenges without sacrificing financial viability.

Furthermore, recognition of the role of SE as a way of solving contemporary problems is evident in the way it integrates environmental concerns, such as climate change and ecological degradation. Sustainable business platforms and networks of social entrepreneurs have begun to form, influenced by a growing awareness of the environmental and social responsibility of companies (Wang, 2022). This evolution reflects a broader realisation that the most effective solutions often arise from collaboration between different sectors and the sharing of knowledge and resources.

In today's context, SE is seen not just as a means of creating new organisations, but as a comprehensive approach to transforming societies. Several authors defend a critical view of SE as an evolving field, emphasising the need for a clear definition that can include the diverse manifestations and challenges that social entrepreneurs face today (Sholihudin & Ismail, 2023). Academic discussions continue to explore the role of governance, social financing and the effectiveness of partnerships between social organisations and private sector entities (Santos, 2012).

However, social entrepreneurs face significant challenges, particularly in the organisational management and legal framework of their initiatives (Pestoff, 2014; Santos, 2012). The lack of a specific and clear legal status for social enterprises contributes to legal ambiguity, making it difficult to access funding, tax benefits and the sustainability of their structures (Teasdale, 2012). Additionally, Renko's (2013) studies argue that the initial challenges faced by nascent social entrepreneurs are unique, and that an understanding of these obstacles is crucial to devising effective strategies. The author’s findings suggest that while social enterprises may resemble traditional ventures during their start-up, they must navigate distinct obstacles - such as aligning social missions with operational practices - that require tailored strategies for long-term success.

2.2. The development of a social entrepreneurship (SE) initiative - the main managerial challenges

Social entrepreneurs are at the root of the creation of a social entrepreneurial initiative (Mair & Noboa, 2006), reflecting the materialisation and combination of social and economic objectives. Social entrepreneurs are often described as individuals motivated by values and a strong concern for social welfare (Chinchilla & Garcia, 2017; Ilyas et al., 2023; Peng & Lin, 2016).

One of the distinctive personality traits of these entrepreneurs is their ability to identify social opportunities that can be converted into local solutions (Bansal et al., 2019). While traditional entrepreneurs tend to focus entirely on profit, social entrepreneurs seek a balance between economic viability and positive social impact. This implies that success for them is not measured only in financial terms, but also in terms of social transformation and the creation of collective value (Shabbir & Batool, 2025). This hybrid nature of SE poses several challenges to the management of such initiatives, particularly in terms of difficulties in accessing funding sources and in attracting and retaining staff. Social entrepreneurs frequently encounter significant obstacles in translating their social innovation intentions into viable, sustainable ventures.

Social organisations in Portugal demonstrate limited financial autonomy and depend heavily on external funding sources. Despite recognising the importance of financial resource management for organisational performance, these organisations often struggle with revenue diversification and self-sufficiency, which hinders their long-term viability (Bernardino & Santos, 2021). Similarly, the analysis of the programme “Partnerships for Impact” by Bernardino et al. (2023) demonstrates that while public funding is vital for piloting and scaling projects, bureaucratic hurdles and weak investor engagement continue to limit its potential.

In addition to financial constraints, organisational effectiveness and performance measurement remain significant challenges. While social organisations acknowledge the strategic importance of performance measurement, not all have implemented robust systems to monitor and evaluate their activities. Organisations with stronger measurement practices report higher perceptions of social and economic impact, suggesting that data-driven evaluation can enhance legitimacy and stakeholder engagement. Moreover, resource management, both tangible and intangible, plays a critical role in achieving positive outcomes and proper alignment and optimisation of internal resources—such as technology, skills, and stakeholder relationships—directly influence performance and mission fulfilment (Bernardino & Santos, 2018; 2019).

Institutional and legal frameworks also impose major structural barriers to the growth of SE initiatives. Bel Durán et al. (2023) observe a mismatch between the innovative, collective nature of youth-led social ventures and the rigid legal structures that govern cooperatives and non-profit labour societies. This regulatory gap restricts scalability and access to funding. In parallel, universities and incubators often fail to provide adequate technical or legal support, hampering formalisation processes. Furthermore, operational inefficiencies related to procurement practices are evident as social institutions seldom adopt strategic tools like shared services or centralised purchasing—undermining cost-effectiveness and resource optimisation (Macedo & Bernardino, 2022).

In more technology-intensive fields like renewable energy, social entrepreneurs face compounding financial challenges due to high entry costs, unclear policy incentives, and limited access to blended financing models. While these enterprises contribute significantly to socio-economic value, their visibility and access to capital are restricted by a general lack of investor awareness and an absence of reliable mechanisms for measuring social impact (Bataineh et al., 2023). Furthermore, the inability to diversify income streams and generate stable revenue is a key inhibitor of organisational resilience (Bernardino & Santos, 2020; 2021). This is particularly evident among younger or first-time entrepreneurs, who often lack the financial literacy and strategic planning skills needed to build economically viable models (Minga-López et al., 2024). These financial pressures force many social entrepreneurs into ethically complex decisions that can compromise their mission, illustrating how financial instability is not only a practical obstacle but also a deeply moral one (Paswan, 2025).

Lastly, human resource management and operational capacity also emerge as pivotal issues in the development of SE. Many organisations in the social sector depend heavily on volunteer labour, which creates inconsistencies in service delivery and challenges in sustaining professionalism. The heterogeneity in human resource practices across organisations, often influenced by leadership profiles and market pressures, leads to disparities in organisational resilience (Bernardino & Santos, 2020).

Training and education also play a crucial role in shaping the profile of the social entrepreneur. These experiences, both formal and informal, shape their attitudes, skills and, above all, their ability to mobilise resources in challenging contexts (Howaldt et al., 2017).

There are also authors that indicate personality traits such as resilience, empathy and leadership skills to be fundamental to the profile of social entrepreneurs. These individuals generally demonstrate a strong ethical commitment and a genuine desire to have a positive impact on people's lives (Alvarez de Mon et al., 2021; Busari, 2025; Dey & Steyaert, 2010; İrengün, & Arıkboğa, 2015).

A deep understanding of the needs of the communities they work with is also critical, facilitating the creation of more effective and targeted solutions (Kummitha, 2017). Other authors also emphasise the capacity of the organisation to innovate, where creativity and adaptation are imperative to fill gaps in sectors where the private sector is not active (Adomako & Nguyen, 2024).

Sustainability as a core component of business models is also a challenge highlighted in literature. Ebrashi (2013) proposes that SE theory should centre on creating sustainable social impact through economically viable models. The author’s work stresses that successful social organisations incorporate sustainability into their strategic planning, ensuring that social change initiatives can endure financially while consistently meeting the needs of the community.

2.3. The legal and regulatory framework for the development of social entrepreneurship (SE)

SE is an area that benefits immensely from policies and regulations, which have the power to shape both the activities of social entrepreneurs and the ecosystem in which they operate. The role of policies and laws is crucial, as they can both encourage and restrict social innovation. Research conducted by the Inspire Project, Sousa et al. (2023) suggests that supportive policies, such as access to funding and training, have a significant impact on the development of social entrepreneurs. These authors show that a political environment that favours access to these resources can facilitate the adoption of innovative practices, allowing social entrepreneurs to create solutions adapted to the needs of their communities. Conversely, the absence of legal or financial support can hinder the emergence of initiatives that would otherwise have the potential to make a positive impact.

Well-structured public policies are essential for creating an institutional environment that favours entrepreneurial decisions. There is a strong interaction between entrepreneurship policies and the willingness of young people to commit to entrepreneurial activities (Zelin et al., 2021). These authors’ work reveals that an environment that offers adequate government support can significantly boost the entrepreneurial spirit among university students, promoting an increase in entrepreneurial activity in various areas. This phenomenon shows how a favourable policy context can not only stimulate entrepreneurial decisions but also cultivate an innovative mindset.

The policies of each country or region also play a key role. For instance, European Union member states have taken different paths in this area. Some countries have created specific laws to regulate social enterprises (such as Italy, Finland or the UK), while others have opted to integrate them into social economy laws (such as France and Greece). Regardless of the approach, it is emphasised that social enterprises must simultaneously incorporate social, economic and governance dimensions, with an explicit general interest mission, democratic management practices and a commitment to social impact (Meira, 2024).

Furthermore, the OECD Report (2021) also points out that proactive public policies in relation to SE can serve as catalysts for economic growth and social development, with implications for creating a more inclusive labour market. This report emphasises the need to promote a regulatory framework that not only supports the growth of social initiatives, but also integrates sustainability and social responsibility considerations into all levels of decision-making (Florek, 2013).

Within the context of public policies aimed at fostering social entrepreneurship, the establishment of a supportive legal framework for social enterprise initiatives becomes particularly significant. Scholars have highlighted that the legal recognition of a specific statute for social enterprises can facilitate the development of such initiatives, especially for those seeking to adopt the legal form of a commercial company (Meira, 2023).

In the various countries that have enacted legislation on social enterprises, two main approaches have been adopted: either the establishment of specific laws to regulate social enterprises, as seen in Finland, the United Kingdom, Slovenia, Denmark, Luxembourg, Italy, Latvia, Slovakia, Cyprus, and Lithuania; or the incorporation of social enterprises within broader social economy legislation, as practiced in France, Greece, Romania, and Spain. Regardless of the approach, it is widely acknowledged that there is no single legal form for social enterprises, which can operate as social cooperatives, mutual societies, associations, foundations, or commercial companies.

In broad terms, and taking into account this legislative mosaic as well as the doctrine produced on the subject (Fici, 2020; Vargas Vasserot, 2023), social enterprises should be understood as private, autonomous, and independent entities in relation to the State (although they may involve the participation of public entities), which necessarily incorporate three dimensions—social, economic, and governance—and are guided by the principles of the Social Economy, thus being intrinsically linked to this sector.

A social enterprise pursues a clear social mission as its primary objective, which should be reflected in its statutes, and which manifests in the promotion of the general interest of society and/or the professional integration of people facing employment difficulties. This social mission is carried out through the development of specific activities with social impact in the areas of social services and goods, culture, environment, education, preservation, territorial cohesion, and local development.

As social enterprises do not aim primarily at profit maximization but rather at the efficient use of available resources to achieve objectives of general interest, a percentage of profits must necessarily be reinvested in the social mission, as established in the statutes. The organizational and ownership structure should be based on democratic, participatory, transparent, and accountable principles. The adopted organizational model should ensure the participation and representation of members, workers, clients, and other stakeholders in management and decision-making processes. Transparency in governance should be ensured through the public disclosure of accounts and social impact assessment processes.

An equitable remuneration policy should be adopted, for example by limiting the gap between the highest and lowest salaries. Finally, suppliers should be selected based on social and environmental sustainability criteria.

These characteristics and requirements confirm the convergence between the social economy and social enterprises (Meira, 2024).

In Portugal, the Social Economy Framework Law (Law no. 30/2013, of 8 May) defines the main entities that make up the social economy sector. According to Article 4 of this law, the following entities are part of the social economy: Cooperatives; Mutualist Associations; Misericórdias; Foundations; Private Social Solidarity Institutions (IPSS) not covered by the previous categories; Associations with altruistic purposes that operate in the cultural, recreational, sporting and local development domains and Entities in the community and self-management subsectors, as defined in the Constitution of the Portuguese Republic.

These entities share common guiding principles, such as the primacy of people and social objectives, voluntary and open membership, democratic and participatory management, reconciliation between the interests of members, users or beneficiaries and the general interest, the defence and application of the results generated by social activity in accordance with the objectives of the social economy, the promotion of autonomy and independence from public authorities and autonomous and transparent management, especially with regard to the participation of workers and users in decision-making processes (Meira, 2013).

Although the Portuguese Social Economy Framework Law does not nominally refer to social enterprises or commercial companies, some legal scholars believe that commercial companies are not excluded from the Social Economy sector under Article 4(h) of the Law (Meira, 2023). However, the same doctrine highlights that, within the Portuguese legal framework, the adherence to the guiding principles of the social economy by commercial companies faces significant challenges. Indeed, in Portugal, the pursuit of profit by a commercial company is considered by the majority of scholars to be an essential element of the company contract. Based on this argument, Abreu (2015, p. 372) appears to exclude commercial companies from being considered social enterprises. In contrast, Farinho (2015, p. 259) argues that the apparent contradiction between the corporate form and the guiding principle of the social economy—which requires the reinvestment of surpluses and consequently prevents profit distribution—could be resolved through a moderate and residual distribution of profits, setting a maximum limit for such distribution. Thus, the solution would involve a restrained and residual distribution of dividends, with a predetermined upper limit for the allocation.

In terms of the organization and operation of commercial companies, some difficulties can also be identified regarding adherence to the guiding principle of democratic control by members. In these companies, it is the participation in the share capital—and not the personal characteristics of the members—that determines and structures the full set of rights and obligations, with particular emphasis on voting rights, which, in principle, are proportional to the shareholder's stake in the company. Once again, drawing on the legal framework for social enterprises in other jurisdictions, particularly the Italian model, we consider that this difficulty can be addressed through the adoption of an inclusive and participatory model of organization and operation, involving shareholders, employees, clients, and other stakeholders in its activities, thereby promoting the representation and participation of all in management and decision-making processes (Fici, 2024).

Finally, it is essential that a commercial company, in order to be qualified as a social enterprise, pursues a specific objective for the benefit of the community or a defined group. It is important to consider whether, in light of the current legal framework in Portugal, there are obstacles preventing a commercial company from pursuing a clear social mission as its primary goal—not seeking profit maximization as its main purpose, but rather the efficient use of available resources to achieve objectives of general interest. In such cases, social responsibility is not merely circumstantial. Indeed, in social enterprises, social responsibility is part of their very essence; it is not an option or a marketing tool, but integral to their way of being, rather than a “means to have” more clients or greater reputation. The approach adopted in some jurisdictions, notably Italy, of specifying a set of activities that embody or implement this objective, appears to us to be the most appropriate way to prevent the emergence of “pseudo” social enterprises operating under a corporate form (Fici, 2024).

In sum, it is a priority that, in Portugal, the concept of social enterprise be developed in dialogue with the concept of Social Economy, and that the catalogue of entities comprising the social economy sector set out in the current Framework Law be revisited, explicitly recognising social enterprises, including those that take the legal form of commercial companies.

3. Methodology

The aim of this study is to analyse the managerial and legal challenges faced by social entrepreneurship (SE) initiatives in Portugal. To achieve this, a qualitative research methodology was adopted, specifically using the focus group technique, which is particularly effective in capturing in-depth insights, group dynamics, and shared experiences in exploratory research contexts (Krueger & Casey, 2014). Focus groups allow researchers to understand not only individual perceptions but also how meanings are constructed collectively (Barbour, 2008).

A script of semi-structured questions was prepared, based on the study's research objectives and supported by an extensive literature review. The script was divided into four thematic sections: (1) characterisation of the social entrepreneur and the genesis of the SE initiative; (2) implementation and development of the initiative; (3) perceived challenges and operational barriers; and (4) reflective insights on the sustainability and future of the SE initiative. A semi-structured guide was used because, according to Morgan (1997), this approach allows responses to be compared while also providing flexibility to explore emerging themes. Prior to the session, a purposive sampling strategy was adopted to identify experienced social entrepreneurs recognised in the Portuguese SE ecosystem, based on their leadership of initiatives with documented good practices. This mapping included awards and public recognition. Once identified, participants were invited via email and provided with detailed information about the project and the goals of the focus group. The session took place online via Zoom on 7 May, lasted approximately 2 hours and 15 minutes, and included five participants. The session was recorded with informed consent and fully transcribed for subsequent content analysis, which is considered a suitable method for interpreting qualitative focus group data (Elo & Kyngäs, 2008).

This method was selected not only for its ability to gather rich qualitative data but also for its appropriateness in exploring complex social issues, such as those inherent in social entrepreneurship, where the interaction between participants can surface nuanced insights (Nyumba et al., 2018). The inclusion of diverse voices and the interactive setting support the generation of more contextualised and grounded understandings of the challenges faced by social entrepreneurs in Portugal.

4. Results

4.1. Characterisation of the participants

The focus group included five participants involved in SE initiatives that were diverse in age, scope of activity, size, or location.

The group is composed of five social entrepreneurs in Portugal, aged between 30 and 54. The group has a slight male majority, with three men and two women. In terms of academic background, all the participants have higher education qualifications, reflecting a high level of qualification. One of the female entrepreneurs, aged 30, has a doctorate in Chemical Engineering, while the other, aged 48, has a master's degree in Humanitarian Action, Cooperation and Development, complemented by a degree in Anthropology. Among the men, one participant, aged 31, has a degree in Environmental Engineering; another, aged 52, has a degree in Economics; and the oldest of the group, aged 54, has a master’s degree in Design and Marketing. This diversity of academic backgrounds highlights the multidisciplinary and heterogeneous nature of the profile of the social entrepreneurs involved in the study.

The focus group included initiatives working with different target groups, including: (i) anyone in mainland Portugal who is connected to electricity; (ii) people, individually or collectively, from the community where the project is located (up to a radius of 2 km); (iii) mainly children, adolescents and young adults, although in other areas society in general can be considered; (iv) voluntary actors, namely individuals, social economy entities, government entities, educational entities and companies.

The participants of the focus group represented a diverse and experienced group of social entrepreneurs, varying in age, academic background, and professional trajectory. Most had been involved in social entrepreneurship for over a decade and brought multidisciplinary expertise ranging from engineering and economics to humanitarian action. This diversity highlights the richness of perspectives within the group. Table 1 provides a concise summary of their demographic and professional profiles.

Table 1. Profiles of participating social entrepreneurs.

	Social Entrepreneur 1 (SE01)	Social Entrepreneur 2 (SE02)	Social Entrepreneur 3 (SE03)	Social Entrepreneur 4 (SE04)	Social Entrepreneur 5 (SE05)
Age	30 years old	48 years old	31 years old	52 years old	54 years old
Gender	Female	Female	Male	Male	Male
Position in the organisation	Chairman of the Executive Board	President	Volunteer / coordinator	Member of the Board of Directors	Founder and Manager of a Social Entrepreneur-ship initiative
Academic background	PhD in Chemical Engineering	Master's Degree in Humanitarian Action, Cooperation and Development, Degree in Anthropology	Environmental Engineer	Economics degree	Master in Design and Marketing
Previous professional experience	Research and development in the area of academic training; Extracurricular, coordination of a volunteer program international missionary, secretary-general and then president of the executive board of an NGDO.	Médecins du Monde (coordinator of the northern delegation 2002-2006; head of mission in East Timor in 2004 for the "Casa das Mães" maternal child health project), UN Volunteer, short-term election observer in Togo with the European Union, Strategic Planning and volunteering consultant, trainer and lecturer (occasionally), author of several books in the field of volunteering and development cooperation.	Energy and climate researcher	More than 25 years in an international environment, banking, consulting and others.	Over 35 years' experience as a designer; More than 15 years' experience in managing social entrepreneurship initiatives.

Source: Own elaboration.

For most of the participants, the contact with SE took place several years ago (more than 10 years); for only one participant it was relatively recent (less than 5 years). In all cases, the participants indicated that they had no family background in SE, although one of them had a family background in entrepreneurship in general. However, the majority indicated that they had people in their personal network or close circle who were related to SE, which has increased in recent years. In addition, all participants indicated that they had social experience prior to setting up the SE initiative, including volunteering, scouting, associations and, in particular, academic associations.

It was also found that the "a more important role than my professional life"; “the fact that it takes up a lot of personal space”; “being a purpose in life”; “great learning in different dimensions (personal and professional)”; “a better connection with the community”; “opportunities and professional recognition”. Unfortunately, one of the participants mentions the possibility of it being only a part-time activity because of the need to combine it with other professional activities.

The focus group shows that the inspiration to be a social entrepreneur comes from the purpose of contributing to a better world, a purpose that is emphasised by all participants. Expressions such as "sense of purpose" (SE01); "creating a fairer world" (SE01); "desire to change the world" (SE04); "connection with the local community" (SE03); "concern for helping the most vulnerable population" (SE03); or "recognition of the deep inequalities that exist" (SE01) were mentioned.

The motivation to get involved in SE initiatives was shaped by personal and professional experiences, including international volunteering experiences (SE01, SE02), associative experiences since childhood (SE02), experiences developed as a result of their academic career (SE02), research interests (SE03), know-how acquired as part of their professional activities (SE02, SE04), and even a certain disenchantment with working in the private for-profit sector (SE04).

Some of the participants were unable to identify a single moment that triggered the creation of the SE project, which was the result of a continuous process of awareness-raising and training for the intervention (SE02, SE04). This construction was mainly shaped by previous social experiences, both in childhood and adolescence (SE02, SE04), by their professional careers (SE02, SE04) and by specific training in the social economy (SE02). In other cases, participants were able to clearly identify the key moment that drove the creation/development of the SE project. The following stand out in this regard: (i) an international experience that allowed them to confront very different realities (SE01); (ii) a community festival where ideas for environmental, social and economic projects were collected, which gave rise to the initiative that was later worked on (SE03).

4.2. The legal form of the social entrepreneurship (SE) initiative

The focus group was attended by three social entrepreneurs whose initiative has the legal form of an association, one entrepreneur who pursued the legal form of a cooperative, and one entrepreneur who adopted the form of a limited liability company to which he later added an association to pursue the area related to education.

When asked about the most appropriate legal form for a collective SE initiative, the participants indicated that the most appropriate legal form depends on the social mission (SE02, SE05) and the governance model that the organisation's leadership wants for the initiative (SE02, SE04). In this context, the social economy entity should choose the legal form that best suits the organisation (SE02).

The associative model is the one most used by participants, although it is not always recognised as the most appropriate for the needs of the entity (SE02, SE03). The choice of the association format was due to the fact that it requires fewer resources (SE01, SE02, SE03), the participation it involves (SE01), with one of the participants considering that it could be the "simplest" model for the project, in which case an existing association was used with the appropriate revision of the statutes (SE03).

One of the participants said that, despite the use of the association form, the model he would most identify with, given the nature of the project, would be the foundation (SE02). Another entrepreneur says that if the project reaches a larger scale, the legal form of a cooperative will be used (SE03).

While recognising the advantages and virtues of the legal form of the association, some criticisms are made, in particular the fact that the model is not suited to the level of civic participation in the country (SE01, SE02, SE04).

The participant who indicated the use of the cooperative form considers it the most appropriate model in his case (SE04). One of the participants started the initiative with a limited company, which proved to be more appropriate given the need for interaction and transactions in the market (SE05). As the project developed, there was a need to create a new entity in the form of a non-profit association, which is used in the education sector.

Some participants said that the existence of the social enterprise model could be very useful for social entrepreneurs in Portugal (SE02, SE05), indicating that if it existed in the Portuguese legal system, they would use it. In a different way, another participant believes that there is no need to create new legal figures, but highlights the need to review the governance models in existing models, as well as a reform of the tax benefits statute applied to the sector, or the responsibility attributed to managers of social economy entities, often without remuneration (SE04).

4.3. Managing the social entrepreneurship (SE) initiative

Main challenges in managing a SE initiative

The focus group identified a number of challenges in setting up and developing the project. First and foremost was the uncertainty at the beginning of the project, when there was only "a very vague idea", which took a very long time and took longer than originally planned (SE03).

The lack of initial knowledge is also pointed out by one of the participants, with learning taking place "on the job, as problems arise" (SE01). This situation means that the time needed for the initial development of activities is longer than desirable (SE01). Another challenge, shared by all participants, is the perceived financial constraints on the development of the project. One of the entrepreneurs says that the contact with peers at European level indicates that the financial constraints felt by SE projects in Portugal are much more severe, since social projects in Portugal work with few resources (SE04).

The lack of resources leads to a strong reliance on volunteer work, which was mentioned by all participants, with a particular focus on the initial phase of the project. This reliance on volunteers brings with it other challenges, namely the lack of consistency in commitment, motivation and focus on the project among all project members (SE01, SE03, SE04). This situation creates an additional workload for paid staff members (SE04). For this reason, the transition from volunteering to professionalisation is repeatedly mentioned by one of the participants as the main challenge (SE04). In addition to the financial constraints already mentioned, another difficulty in professionalising resources, according to one of the participants, is related to a certain prejudice and conservatism that still exists in the country, as well as misinformation and ignorance of the legislation in force (SE02).

Another challenge for SE projects is their strategic development, which is often influenced by existing financial support programmes (SE01, SE04). In this context, it is sometimes the available funding programmes that determine the development of new activities, rather than the opposite (SE04), which means that the organisation does not primarily try to respond to the activities perceived on the ground as worthy, but rather to actions that correspond to existing funding opportunities (SE01).

The salary conditions offered by social projects were identified as an additional challenge. It was mentioned that social entrepreneurs who decide to start a project face enormous financial constraints on a personal level, which are aggravated by the lack of a social structure to support new social entrepreneurs (SE01), as well as the ability to retain employees who may leave the social project due to the need to seek better salaries in other sectors (SE04). A solution found by one of the entrepreneurs to deal with the high turnover is based on job design, seeking some redundancy in the organisation to accommodate potential turnover (SE03).

The lack of recognition for the project, which naturally occurs at an early stage, is identified as a challenge that exacerbates other problems such as access to funding and building partnerships (SE01, SE02). Building a reputation in the sector is a long and continuous process, which has important benefits for social projects but is a major obstacle for social entrepreneurs just starting their activities (SE02).

When asked how they try to overcome the challenges they face, participants mentioned several factors.

The importance of all the hard work and dedication, much of it taken on by individual leaders (SE03, SE04), as well as resilience, a spirit of sacrifice and the fact that they believe in the mission of the organisation (SE02), are identified from the outset. Training is also mentioned, even if it is at the request of the social entrepreneur (SE01).

One of the participants underlines the importance of strategic planning from the beginning, which is done continuously and includes the concern for the financial sustainability of the organisation from the beginning (SE01). According to the participant, even if this financial sustainability cannot be achieved in the initial phase, it should be advocated in strategic planning and in the decision-making process (SE02). One participant emphasises that they work on the basis of the project cycle methodology, with clearly defined objectives and results and objectively verifiable indicators, which is essential to ensure strategic coherence and that there are no distortions arising from the search for funding sources (SE02).

Flexibility and adaptability to external circumstances are also mentioned as important (SE02). The use of funding programmes to ensure the continuity of the organisation and the ability to recruit staff is also mentioned by several participants (SE02, SE03, SE04). The number of people, or the community as a whole, who have voluntarily joined the project and are now working with it in an agile way, was also highlighted (SE03).

The creation of contacts in the area (SE01), reputation (SE02, SE04) or partnerships created at local level and with other organisations (SE03) are also highlighted as fundamental. This includes establishing links with universities to bring scientific knowledge into the project (SE02, SE03).

Measuring impact is also one of the strategies used by one participant and it is important to demonstrate innovation and the ability of the project/organisation to create social value in the community (SE02). However, the other participants say that they don't have an impact management system, although they do use some indicators. This is due to a lack of resources or knowledge (SE01, SE03, SE04). The constant change in applicable regulations is cited as an obstacle, as it takes away from the organisations' capacity to work, which is mainly focused on solving immediate problems rather than thinking more deeply about management systems (SE04). Some participants, although they don't have impact measurement indicators, consider that the strong growth of the organisation in recent years is a sign of good performance (SE03, SE04). One of the participants, despite not having a performance management system, believes that this would be good practice for the organisation (SE04). On the other hand, one of the participants stated that it already had an impact measurement system for projects, based on the project cycle methodology already in use (SE02). The creation of an impact measurement system for the organisation as a whole is very recent and was done through a funding programme aimed at building institutional capacity (SE02). The evaluation cycles to be considered will be 4 years in order to be synchronised with the duration of the mandate and the time horizon of the strategic plan.

Finally, one of the participants also mentioned the importance of the communication strategy followed, especially in social networks and also through the media, which allows the project to reach more people, give it more visibility and even achieve some media projection, which is important for mobilising resources and solving the problems encountered (SE03).

Good practice in managing a SE initiative

The research also aimed to find out which practices developed within the SE Initiative the participants considered to be good practices in the management of the organisation/project.

Several elements were mentioned in this context. First of all, the fact that there is a well-defined strategic, project and organisational planning (SE02). The transparency of the initiative, both internally and externally, is also mentioned by two of the participants during the focus group (SE01, SE05). One of the participants mentions communication about the status of the project, including information about meetings that have already taken place (SE03). Another participant emphasises, in the area of transparency, the organisation's commitment to ensuring that donations are used for the purpose for which they were collected (SE01). There is also a strong involvement of the teams, with space for them to be heard (SE05), and the adoption of participatory decision-making processes (SE01).

One of the participants highlighted the existence of two different moments in the social organisation's involvement with the target audience. An initial, more solitary moment and the subsequent, more participatory one, with the involvement of a group of actors, including actors from the public sector, the private sector, communities, including individuals who suffer from the social problem addressed by the social organisation, through a significant sectoral and geographical transversality, although there may be different levels of involvement (SE05). For the participant, this involvement is important for social innovation and for the co-creation process that the organisation values (SE05).

The analysis of the results shows that one of the practices adopted by one of the participants is considered relevant and concerns the internalisation of a number of business processes that were carried out externally. According to the participant, the fact that these processes were now carried out within the social organisation (SE04) had very significant advantages. The analysis of good practices also reveals the spirit of continuous improvement that accompanies the organisation (SE05), training (SE02) or new methodologies developed by the organisation in its field of intervention, which it intends to replicate, scale up and even internationalise (SE02); in fact, social innovation is understood by the participants as the basis of the project/organisation, forming part of its DNA from the outset (SE02, SE03, SE04). Innovation is applied in the management of the organisation as a whole (SE01), in the search for solutions to the social problem to be addressed (SE05), in the identification of new methodologies (SE02) or in the design of the sustainability model (SE05). The social innovation pursued is seen by all participants as essential to the success of the organisation, allowing it to reinvent itself, find solutions and fulfil the purpose for which it was created (SE05).

4.4. Discussion of results

The findings of the focus groups strongly corroborate the challenges identified in the literature, particularly regarding the financial fragility of SE initiatives. As highlighted by Oliveira et al. (2018) and Bernardino and Santos (2021), financial sustainability remains a core concern, with participants in this study frequently referencing severe budgetary constraints and over-reliance on volunteer labour. This aligns with broader academic consensus that SE ventures often struggle to access diversified and stable funding sources, resulting in limited operational capacity and difficulty in scaling their initiatives (Bataineh et al., 2023; Paswan, 2025).

Furthermore, the empirical evidence confirms that legal and regulatory uncertainty continues to obstruct the growth and consolidation of SE in Portugal. While the Social Economy Framework Law provides some structure, the absence of a dedicated legal status for social entrepreneurship initiatives with the legal form of a commercial company forces many to adopt unsuitable legal forms, such as associations, based on practical ease rather than strategic fit. This echoes Meira's (2023, 2024) argument that legal recognition of a status for social enterprises is required, providing a framework for social entrepreneurship initiatives that adopt the legal form of companies. Participants' reflections also validate Teasdale's (2012) view that hybrid organisational models require greater institutional recognition and policy reform to function effectively.

In terms of organisational management, the focus group emphasised the absence of formal impact measurement mechanisms, despite a strong awareness of their importance. This is consistent with findings from Bernardino and Santos (2020), who noted that organisations with robust monitoring and evaluation systems tend to perform better in both social and financial terms. Nonetheless, limited access to technical training, insufficient internal capacity, and a lack of funding dedicated to strategic development appear to hinder the implementation of such systems in the organisations represented.

Finally, the motivations and values expressed by participants—particularly their strong sense of social purpose, ethical commitment and community embeddedness—reinforce the theoretical proposition that social entrepreneurs are driven by more than economic incentives (Dey & Steyaert, 2010; Shabbir & Batool, 2025). However, this intrinsic motivation must be supported by a policy ecosystem capable of translating social innovation into sustainable impact. As noted by the OECD (2021) and the Inspire Project (Sousa et al., 2023), supportive legal and institutional infrastructures are not merely desirable but essential for SE to thrive. The study's results thus reinforce calls for more coherent, enabling environments for social entrepreneurship in Portugal and beyond.

5. Conclusions

The research developed reveals that SE in Portugal represents a dynamic and constantly evolving field, marked by a strong transformative motivation on the part of its protagonists, but also by a significant set of structural challenges. The study showed that Portuguese social entrepreneurs share a strong personal and professional motivation oriented towards creating social value, often rooted in volunteering experiences, community involvement and contact with diverse social realities. This motivation, combined with multidisciplinary academic and professional backgrounds, forms a solid basis for the development of innovative and impactful initiatives. However, the sustainability of these initiatives faces significant obstacles, particularly in terms of access to stable funding, the transition from volunteering to professionalised structures and the creation of strategic management models capable of resisting the pressure of dependence on conditional public and private funds.

From a legal point of view, the study confirms that the current Portuguese legal framework, although diverse in terms of the legal forms available (associations, cooperatives, foundations…), does not respond sufficiently to the specificities of SE organisations, namely those that intend to adopt the legal form of a commercial company. The lack of a specific legal status, such as that of a social enterprise, compromises the effectiveness of these organisations' activities, particularly in terms of institutional recognition, eligibility for tax incentives and strengthening their legitimacy with partners and funders. The focus group participants themselves acknowledge that the choice of legal form is often the result of practical constraints - such as the ease of setting up associations - rather than a strategic fit with the organisation's mission. In response to these limitations, there is a clear need to reform the legislative framework so that it can include a hybrid figure adapted to the reality of SE, recognising and valuing the dual social and economic mission that these entities take on.

In terms of management practices, the research identified good practices that reflect maturity and innovation, such as the adoption of participatory decision-making processes, strategic planning, impact measurement, transparent communication and active community involvement. Even so, these practices are often limited by a shortage of human and financial resources, requiring an additional effort of resilience and creativity on the part of social entrepreneurs. The professionalisation of teams, continuous training and the creation of collaborative networks are seen as promising ways to overcome these limitations. In this context, social innovation emerges as an essential pillar of these organisations' identity, cutting across both their internal management and their response to the social problems they seek to solve.

This study therefore concludes that strengthening SE in Portugal requires coordinated action between different players: entrepreneurs, legislators, policymakers, funders and academia. Creating more appropriate legal, institutional and financial conditions could not only consolidate the sector, but also boost its contribution to social cohesion, sustainable development and social innovation in the country. SE should not be seen as a substitute for public policies, but as a strategic partner in building more effective, participatory and transformative responses to contemporary social challenges.

The research carried out has some limitations, including the exploratory nature of the research and the fact that it was carried out in a specific context - Portugal. In the future, a comparative study of the challenges faced by social entrepreneurs in different countries, at a European and global level, is recommended. In addition, future research should include focus groups with other relevant stakeholders, such as policymakers and regulatory entities.

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Author's contribution

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Data availability

Access upon request (restricted)

The data underlying the findings of this study are restricted and are not publicly available. However, the authors will provide the data to interested readers upon request.

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While preparing this paper, the authors used Deepl to check spelling and grammar. After using this tool, the authors reviewed and edited the content as necessary, assuming full responsibility for the content of the publication.

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