Social enterprise and wellbeing - Insights from the capability approach

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Social enterprises (SEs) are purpose-driven organisations that balance a dual-bottom line. They seek to alleviate pressing societal and environmental issues, supporting their efforts through commercial revenue gathering activities. This research focused on five SEs in New Zealand whose mission centred on employment creation for marginalised people. The organisations provided jobs for individuals with disabilities, former-prisoners, Māori and Pasifika, and at-risk youth. This study aimed to create new knowledge on the impact these SEs had on the reported wellbeing of their employees. It operationalised Amartya Sen's Capabilities Approach (CA) to conceptualise wellbeing around the opportunities and/or freedoms available to them to lead lives they value, and have reason to value. The approach argued wellbeing was enhanced by expanding the range of things a person could be or do. The CA has been more recently been applied in SE literature. Existing studies have primarily addressed theoretical implications, with particular focus placed on reconceptualising social value. This research has contributed an empirically based assessment of the impact SE has on peoples' wellbeing. A series of structured interviews assessed the wellbeing of current employees', and focused on their achieved functioning states. Individuals reported improved levels of trust and life satisfaction, reduced loneliness and more contact with friends, and increased income sufficiency. Modelling using multiple linear regression explored the relationships between wellbeing domains and their associated functioning states. Changes reported in subjective wellbeing were associated with changes across the wellbeing domains including civic engagement and governance, jobs and earnings, and social connections. The research findings show SEs have a positive impact on wellbeing, and it is suggested that the capabilities of some employees expanded after joining their respective organisation.

Keywords: Social Enterprise, Wellbeing, Capabilities Approach, Capabilities, Functionings, Subjective Wellbeing, Opportunities, Freedoms, Social Value.

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Chapter 1

Introduction

In 2017, New Zealand hosted the 2nd Social Enterprise World Forum. The event was attended by 1,600 delegates from over 28 countries, and attracted social entrepreneurs, investors, academics, and community leaders. It promoted organisations that generated sustainable and ethical goods and services for citizens and consumers. The incumbent Labour government reaffirmed at the forum its commitment to policy that supported long-term investment and growth of the sector. In 2018, the Social Enterprise Sector Development Programme was established to help drive further growth and enhance collaborative efforts between the public and private sector. It was founded on the view a thriving social enterprise (SE) sector could help tackle serious social and environmental problems, and contribute to enhancing the wellbeing of New Zealanders. Emerging literature has suggested SE could provide lessons and inspiration for those looking to transform to a 'wellbeing economy' (Roy, 2021).

A wellbeing economy that is designed to work for people and the planet has captured the imagination of some politicians and policy makers (Coscieme et al., 2019; Roy, 2021). Economists have often assumed that enhancing wellbeing is best achieved through high levels of economic growth; however, experience has shown the pursuit of growth can lead to policies that harm the wellbeing of people (Dalziel et al., 2018). In 2008, French President Nicholas Sarkozy, unsatisfied with the current state of statistical information about the economy and society, set up the 'Commission on the Measurement of Economic Performance and Social Progress'. The report's unifying theme was "the time is ripe to shift emphasis from measuring economic production to measuring peoples' wellbeing" (Stiglitz et al., 2009, p. 12). The report pointed to the limitations associated with GDP as a measure of national wellbeing (Costanza et al., 2009). It is an important indicator of market production, but has often led to policies and initiatives that focus on the wellbeing of producers rather than consumers. The commission outlined there was a growing gap in the information contained within GDP data and peoples' wellbeing. This was because it only took certain activities into consideration, neglected important types of work, and did not account for negative environmental or societal externalities (Meadows et al., 2004; Stiglitz et al., 2009). It supported economic development that did not prioritise growth and material consumption at the expense of people's wellbeing and the natural environment.

Amartya Sen was a member of the commission whose Capabilities Approach (CA) informed some of the report's theoretical foundations. It was first introduced during the Tanner lecture series titled

'Equality of What' in the context of development studies, and also offers a compelling alternative to the income, utility, and commodity-based approaches to wellbeing (Kato et al., 2017). Individual's wellbeing is conceptualised around the capabilities (opportunities and/or freedoms) available to them to lead lives they value, and have reason to value (Sen, 1985). Wellbeing can be enhanced through the expansion of these capabilities. The approach is highly influential and has informed national wellbeing frameworks including New Zealand Treasury's Living Standards Framework (LSF) (Hall, 2019).

The LSF was introduced in 2011 to promote thinking around the impact policy had on wellbeing. It complements existing analytical frameworks and efforts to provide comprehensive economic policy advice to the incumbent government. It supports work that seeks to enhance the living standards of New Zealanders through the removal of obstacles and provision of greater 'opportunities, capabilities, and incentives' for individuals to lead valued lives (New Zealand Treasury, 2018a). The framework now includes 12 domains of current wellbeing outcomes; four capital stocks that support the wellbeing of New Zealanders now and into the future; and consideration of the risks and resilience of these four capital stocks to change in response to unexpected events. It assesses the distribution of wellbeing across three dimensions: people, place, and generations. The LSF set the stage for New Zealand's first Wellbeing Budget which directly acknowledged that economic growth alone did not guarantee improvements in living standards and wellbeing.

In 2019, Prime Minister Jacinda Ardern released the inaugural Wellbeing Budget, and stated that

> *"[…] while economic growth is important – and something we will continue to pursue – it alone does not guarantee improvements to our living standards" (New Zealand Treasury, 2019b).*

Finance Minister Grant Robinson believed it heralded the beginnings of a new approach to how the government worked and measured success (New Zealand Treasury, 2019a). Robinson outlined this stating:

> *"This approach represents a significant departure from the status quo. Budgets have traditionally focused on a limited set of economic data. Success has been declared on the basis of a narrow range of indicators, like GDP growth. But New Zealanders have questioned that claim of success when they have seen other things that we hold dear – child wellbeing, or being able to swim in our rivers and lakes – getting steadily worse. The old ways have left too many people behind. It is time to change" (New Zealand Treasury, 2019a, p. 3).*

The Budget focused on five key areas including mental health; child poverty and family violence; Māori and Pasifika outcomes; innovation in a digital age; and transforming to a sustainable and low-emissions economy. It sought to provide opportunities to those that did not have them, marking an important milestone in New Zealand's journey towards a wellbeing economy. Dalziel (2020, p. 478) outlined:

> *"The 'Wellbeing Budget' represents a part of a rich history of distinctive Australasian contributions to wellbeing economics and public policy going back to Dame Marylin Waring's influential book, Counting for Nothing (1988)".*

The government has recognised SE organisations can provide essential goods and services that could also aid in these efforts (Ākina Foundation, 2021).

The release of the initial Wellbeing Budget coincided with a report produced for the New Zealand Social Enterprise Sector Development Programme. The report titled 'Structuring for Impact: Evolving Legal Structures for Businesses in New Zealand' advocated that SE become a recognised legal category through changes to the 1993 Business Companies Act. It argued the current legal structures available were built on traditional ideas that categorised groups as either a limited liability company or a charity, leaving little room for SE organisations that operated in the middle ground (Horan et al., 2019). The report detailed how the legal structures and financial expectations had hindered the development of SE in New Zealand. It was reasoned adequate support and removing obstacles to growth would unlock the potential of the SE sector to generate social and environmental value that could enhance the wellbeing of New Zealanders.

The report reflected on the growing government support and recognition of the SE sector in New Zealand over the previous years. In 2014, the government released a statement that acknowledged the value of a SE sector, and the need for collaborative action that would ensure organisations could reach their full potential (Department of Internal Affairs, 2014). It was recognised that SE could play an important role in social innovation and economic development in New Zealand. To facilitate the growth of the sector the government partnered with the Ākina Foundation (formerly known as the Hikurangi Foundation) to support SE start-ups. The Foundation was allotted $1.12 million that enabled a national SE incubation and development service to be introduced. A cross-agency working group was also established to further facilitate the development of the SE sector, and consisted of the Department of Internal Affairs, Ministry of Business, Innovation and Employment (MBIE), Te Puni Kokiri (TKP), and the Social Investment Unit (SIU).

In 2017, the SE sector received an additional $5.5 million funding to facilitate the development of the Social Enterprise Sector Development Programme. The Ākina Foundation was awarded the funding and tasked with expanding New Zealand's SE market. The organisation focused on providing tailored business development services; improving access to investment capital; fostering SE networks; and conveying the impact of the sector. The additional funding also secured more research into the SE sector. The Business and Economic Research Limited (BERL) estimated the sector consisted of 2,589 organisations that contributed around $850 million to New Zealand's GDP (BERL, 2019). The study revealed a sector that was still in the earlier stages of development. It pointed out there remained considerable confusion around SE business models and differentiating these from traditional trusts and charities. In addition, the lack of a consistent definition and industry classification undermined efforts to understand and measure the impact of the sector in New Zealand.

The Social Enterprise Sector Development Programme has overseen the development of several key initiatives. A National Advisory Board for Impact Investing in New Zealand was established to connect the country with global markets and support impact investment. In addition, the New Zealand 'Impact Enterprise Fund' was established in 2018, and was the first domestic investment fund that invested in businesses that would generate tangible social and environment impact. The fund raised $9 million which provided financial support across a range of investment stages including seed and start-up capital, share purchases, replacement capital, and capital for expansion opportunities. Investments were considered scalable businesses that delivered tangible social and/or environmental returns on their commercial operations, alongside the prospects of financial returns. By the end of 2020, six organisations had received support from the investment fund. Finally, the development programme established the 'Impact Initiative', an online platform that sought to capture and share the voices of the SE sector. The programme accelerated the development of the sector and established foundational blocks for future growth. It was the product of increased attention and input from government ministers and departments, and growing collaborative relationships between the public and private sectors.

1.1 Research questions

Thus, attention on New Zealand's SE sector has grown steadily over the last decade. The public sector interest in organisations that pursue a dual-bottom line and generate social and/or environmental value has prompted increased funding and development of support structures. It has been suggested SEs are a useful tool for enhancing the wellbeing of New Zealanders; however, there is a lack of research or data available that assesses the impact these organisations have on peoples' wellbeing. Therefore, this thesis aims to contribute to insight into the impact SE organisations have on wellbeing. The research examines peoples' lives to assess any changes in wellbeing resulting from

interactions with a SE. To achieve this aim, the thesis addresses four research questions that investigate SE organisations impact on wellbeing. The first research question asks:

RQ1. How does individuals' capabilities and/or achieved functionings compare before and after they join a social enterprise organisation?

The second question expands on the initial one and explores individuals' wellbeing in relation to other population groups in New Zealand.

RQ2. How does the capabilities and/or achieved functionings of those that interact with a social enterprise compare with other population groups in New Zealand?

The thesis then explores the factors behind individuals' subjective wellbeing before their involvement with a SE organisation. The subjective wellbeing of a person provides some insight into how they perceive their overall wellbeing. The third question asks:

RQ3. What are the explanatory factors behind individuals' subjective wellbeing prior to their involvement with a social enterprise organisation?

Finally, the fourth question assesses if the changes individuals experience through their interaction with SE organisations affects their subjective wellbeing.

RQ4. *Do social enterprise organisations impact the factors behind an individual's subjective wellbeing, and if so, does this affect the changes individual's report in their subjective wellbeing?*

1.2 Structure of thesis

The thesis consists of eight chapters and is structured as follows. Chapter 2 provides an overview of the SE sector and the organisations that occupy a position between traditional for-profits and non-for-profits. It initially addresses the diversity of thinking around SE definitions and terminology, and then explores the defining characteristics of organisations that pursue a dual-bottom line. A brief assessment of the factors constraining the growth and development of SE then follows. The chapter moves on to assess the impacts and outcomes of these organisations, and in particular focuses on those that provide job opportunities to individuals that face substantial barriers to employment. Finally, the chapter outlines that current state of the domestic and international SE sectors.

Chapter three addresses a wellbeing-based approach to economics. It briefly outlines the basic theory of economic growth and its limits as a measure of national wellbeing and societal progress. This follows with an assessment of the relationships between the market economy, business, and wellbeing. The remaining portion of the chapter focuses on Amartya Sen's Capabilities Approach

(CA). It addresses the core concepts, terminologies, critiques, applications, and the challenges associated with its operationalisation. The chapter concludes by addressing the approach and its influence on economic development and national wellbeing frameworks.

Chapter four expands on the theoretical base established in the previous chapters, and reviews the relevant literature. The section initially addresses the primary methods that assess and measure the social value SE create. The remainder of chapter outlines the application of the CA in SE literature, addressing its use as a theoretical framework for conceptualising the impact and outcomes of SE organisations. The main findings, limitations, and knowledge gaps from key research publications are also assessed.

Chapter five outlines the methodological procedures behind the thesis. This research assesses the impact SEs have on people's wellbeing, and also examines the relationships between the wellbeing domains and their associated functionings. The chapter addresses the operationalisation of the CA and outlines appropriate methods to address the research questions. It outlines the procedures behind the selection of SE organisations and participants in the sample group. It addresses the selection of a suitable comparatory group and the considerations behind identifying a suitable data collection tool. It addresses ethical considerations that arise when assessing vulnerable individuals from marginalised or at-risk communities. The chapter then outlines the data analysis procedures implemented in this research.

Chapter 6 presents the research findings and results. It provides an assessment of the impact SEs have on individuals' wellbeing. It examines employees' wellbeing and compares it with other population groups in New Zealand. It also utilises the Treasury's Living Standards Framework (LSF) dashboard to view their wellbeing. The chapter then assesses the explanatory factors behind individuals' subjective wellbeing using a series of multiple linear regression models. The remainder of the chapter addresses individuals' personal experiences, and focuses on valued impacts and perception of opportunities outside their respective SE organisation.

Chapter 7 presents a discussion of the results and key findings. It addresses these in the context of relevant SE and capability literature. The data shows the organisations employ individuals from marginalised communities, and provide meaningful opportunities for their employees'. The results show the SEs make important contributions to wellbeing.

Chapter 8 provides some concluding thoughts on this research. It gives a summary of the key findings and conclusions from the thesis. The chapter addresses policy implications of this study, addresses some of its limitations, before laying out some suggestions for future research.

Chapter 2

Social Enterprise

2.1 Introduction

This chapter describes the SE organisations that occupy the ground between the traditional for-profit and non-for-profit sectors. The chapter initially looks at the definitions, terminologies, and key characteristics of SE to provide an understanding of the organisational type. The following section outlines and clarifies the concepts of social entrepreneurship and social entrepreneur which are often used interchangeably in SE literature. The chapter then briefly assesses the place SE groups hold amongst the traditional private, public, and non-profit sectors. The next section then outlines the main challenges and obstacles that confront SE organisations. This is followed with a broad assessment of SE impact and outcomes, with particular emphasis placed on organisations that are employment focused. The chapter concludes with a brief outline of the United Kingdom, United States, Australian and New Zealand SE sectors to provide a broader global context.

2.2 Defining social enterprise

SEs have been broadly defined by their distinctive social, economic, business, and revenue gathering characteristics (Boschee, 2001; Dart, 2004; Dees, 1998; Di Domenico et al., 2010; Emerson & Twersky, 1996). These definitions have often reflected their pursuit of financial sustainability through socially motivated business that benefits beneficiaries and communities (Agafonow, 2015; Di Domenico et al., 2010; Weaver, 2018). Lorenzo-Afable et al. (2020) argued social entrepreneurs established SEs because they cared about a particular issue or people and were driven by a sense of responsibility to provide care. Dart (2004, p. 414) referred to them as "market driven, client driven, self-sufficient, commercial, and business-like" organisations that generate revenues and profit rather than relying on traditional membership fees, grants, and donations. The existing definitions also reflect their pursuit of a social mission where SEs seek to alleviate problems such as homelessness, poverty, or unemployment (Scarlato, 2013). Alter (2007, p. 12) defined SEs:

> *"…as any business venture created for a social purpose - mitigating/reducing a social problem or a market failure - and who generate social value while operating with the financial discipline, innovation, and determination of a private sector business".*

In general, SEs are understood as organisations that operate with a social purpose, and utilise business to advance human development and a core social mission (Barraket et al., 2010; Besley &

Ghatak, 2013; Luke & Chu, 2013; Talbot et al., 2002; Tanekenov et al., 2018; Weaver, 2018). This description is indicative of some agreement regarding the general characteristics of SEs. Young and Lecy (2014, p. 1309) observed there was "some consensus that existed around the nature of social enterprise, but only at a higher level of abstraction". Ridley-Duff and Bull (2015, p. 83) agreed stating there "was some convergence regarding the common denominator of SEs trading to support social aims." They argued there was consensus on several characteristics including: clear ethical values; clear statements about social and/or environmental mission; evidence of social impact; reinvestment of their surpluses/profits back into meeting their social/environment objectives (Ridley-Duff & Bull, 2015). However, behind this agreement there remains no universally accepted definition as illustrated by the array of existing SE definitions (refer to Table 2-1). The table does not give an exhaustive list of definitions, but provides some indication of the existing definitional landscape.

Table 2-1 List of existing definitions of social enterprise (SE).

Author(s)/Organisation	Definition of Social Enterprise
Organisation for Economic Co-operation and Development (2013)	Any private activity conducted in public interest, organised with an entrepreneurial strategy, but whose main purpose is not the maximisation of profit but attainment of certain economic and social goals, and which has the capacity for bringing innovative solutions to the problems of social exclusion and unemployment (OECD, 2013).
Nyssens (2006)	Organisations with an explicit aim to benefit the community, initiated by a group of citizens and in which the material interest of capital investors is subject to limits (Nyssens, 2006).
Haugh (2006)	Organisations that trade with a social purpose. Adopt a variety of different legal formats but have in common the principles of pursuing business-led solutions to achieve social aims, and the reinvestment of surplus for community benefit (Haugh, 2006).
Thompson and Doherty (2006)	Groups seeking business solutions to social problems. Distinguished from other socially-orientated organisations and initiatives that bring (sometimes significant) benefits to communities, but which are not wanting or seeking to be 'businesses' (Thompson & Doherty, 2006).
Alter (2007)	Any business venture created for a social purpose. They address a social issue or a market failure and generate social value while operating with the financial discipline, innovation, and determination of a private sector business (Alter, 2007).
Brouard and Larivet (2010)	Organisations that pursue social missions and operate to create community benefit regardless of ownership, or legal structure and with varying degree of financial self-sufficiency, innovation, and social transformation (Brouard & Larivet, 2010).
European Commission (2011)	SEs operate in the social economy, and whose main objective is to have a social impact rather than make a profit for their owners or shareholders. They operate by providing goods and services for the market in an entrepreneurial way and innovative fashion ad uses its profits primarily to achieve social objectives (European Commission, 2011).
Kadir and Sarif (2016)	Generic term for a non-profit enterprise, social-purpose business or revenue-generating venture founded to support or create economic opportunities for poor and disadvantaged populations while simultaneously operating with reference to the financial bottom line (Kadir et al., 2016).
New Zealand Department of Internal Affairs (2016)	Organisations that have a social, cultural, or environmental mission, derive a substantial portion of its income from trade, and reinvest the majority of its profits in the fulfilment of its mission (BERL, 2019).
Weaver (2018)	A social intervention that operates under any legal form and utilises business to advance human development. An emerging form of business that aims to address social problems (Weaver, 2018).

Akbulaev et al (2019)	A legally registered organisation whose activity is not centred on profit but is targeted at solving social and environmental problems. The profit is directed mainly to the development of the organisation or to public affairs (Akbulaev et al., 2019).
Ridley-Duff and Bull (2019)	Business with primarily social objectives whose surpluses are principally reinvested for that purpose in the business or in the community, rather than being driven by the need to maximise profit for shareholders and owners (Bull & Ridley-Duff, 2019).
Ākina Foundation (2020)	Purpose-driven organisations that trade to deliver positive, cultural, and environmental impact (Ākina Foundation, 2018b).
Kartikasari et al (2020)	SEs are diverse organisations with innovative models that create and trade products and services in the marketplace, and reinvest profits to advance the social objective rather distribute them to business shareholders or owners (Kartikasari et al., 2020).

Source: Variety of authors informed this table and have been referenced accordingly.

The lack of a universally accepted definition reveals underlying uncertainty around what constitutes a SE (Dees, 1996, 1998; Teasdale, 2012; Young & Lecy, 2014). The general public, policymakers, and SE practitioners as a result often adopt very broad or narrow definitions of SE organisations. Pestoff and Hulgård (2016) believed broader definitions often meant large multinational corporations could qualify as a SE. These organisations may provide employment for young people, and could even engage in some level of corporate social responsibility. Pestoff and Hulgård (2016) argued while these activities clearly represent important social values, they do not compromise the central focus of the business and their marketplace activities. It was believed this represented a means to an end, rather than an end in themselves. Pestoff and Hulgård (2016) found that some avoid this by employing a narrower definition of SE. However, this can produce the opposite effect, whereby almost nothing qualifies, as very few organisations meet the strict criteria to gain public recognition as a SE.

Academics have contributed their thoughts and opinions on the core characteristics or traits that define SE organisations. Fayolle (2010) stated the primary characteristics of SE were the presence of a social mission; the use of assets and wealth for positive community benefit; positive social transformative impact; innovation; and some level of financial self-sufficiency. Di Domenico et al. (2010) believed the primary traits included the pursuit of revenue gathering strategies; core social and environmental goals; supply of goods and services to communities; and their close association with groups that have limited access to resources. Ridley-Duff and Bull (2015) pointed to the ambition to create social innovation; having a social mission; and social ownership as key characteristics. These key traits to help distinguish SE organisations from other traditional counterparts in the non-profit and for-profit sectors, and will now be outlined briefly.

A commonly identified trait is SEs pursuit of a dual-bottom line. This refers to the generation of both social and economic value and is seen as a defining characteristic of a SE organisation (Weerawardena & Mort, 2006). SEs seek to balance a social and/or environmental mission while carrying out commercial revenue-gathering activities that aid their financial self-sufficiency and sustainability (Besley & Ghatak, 2013; Dacin et al., 2010; Emerson & Twersky, 1996; Mair & Marti, 2006; Weaver, 2018). SEs differ from conventional for-profit businesses as they apply market strategies and business structures to develop products and services that can support their efforts to alleviate social issues including homelessness, joblessness, poverty and inequality (Barraket et al., 2010; Teasdale, 2010a; Weaver, 2018). The social and/or environmental mission are embedded at the core of the organisation (Peredo & McLean, 2006; Stevens et al., 2015). These missions can take a variety of forms, for example, providing employment opportunities for disadvantaged people that face substantial obstacles to working. Kaplan (2013) argued the fundamental purpose of SE was to address their social mission that was clearly set out in the organisation's governing documents. The revenue aims to bring financial stability and sustainability. Generating sufficient revenue streams means organisations need to balance resource acquisition that aids competitive advantage, with the use of resources that engages with key stakeholder groups (Doherty et al., 2014). It is important to note that it is often unclear what role grants and donations have in their financial sustainability, and how reliant SEs can be on these for support (Doherty et al., 2014).

Another defining feature are the business models SE use to balance their dual-bottom line. Sabeti (2011) observed SE often use unique business models when combining social and/or environmental missions with a business engine. These unique business models are often described as hybrid structures (Battilana et al., 2015; Doherty et al., 2014; Ebrahim et al., 2014; Grassl, 2012). Grassl (2012) outlined that SE business models need to be driven by a social mission; abstain from distributing profits to shareholders; generate positive societal impacts; recognise the need for entrepreneurial drivers; and enable them to achieve competitiveness in commercial marketplaces. Developing a business model that helps achieve these goals presents significant challenges, and many often struggle to successfully generate even small amounts of social and economic value (Grassl, 2012). Existing research has provided some insight into how SEs design their business models, with particular attention focusing on the tensions that emerge from the pursuit of a dual-bottom line (Doherty & Kittipanya-Ngam, 2021). Spear et al. (2009) for example, observed SEs found it difficult to identify and develop board members; grow the right governance and legal structures; manage diverse stakeholder interests; and balance business and commercial decisions with the core social mission.

Accountability and transparency structures are also defining SE characteristics (Doherty et al., 2014; Mäkelä et al., 2017; Thompson & Doherty, 2006). Organisations that pursue social and economic

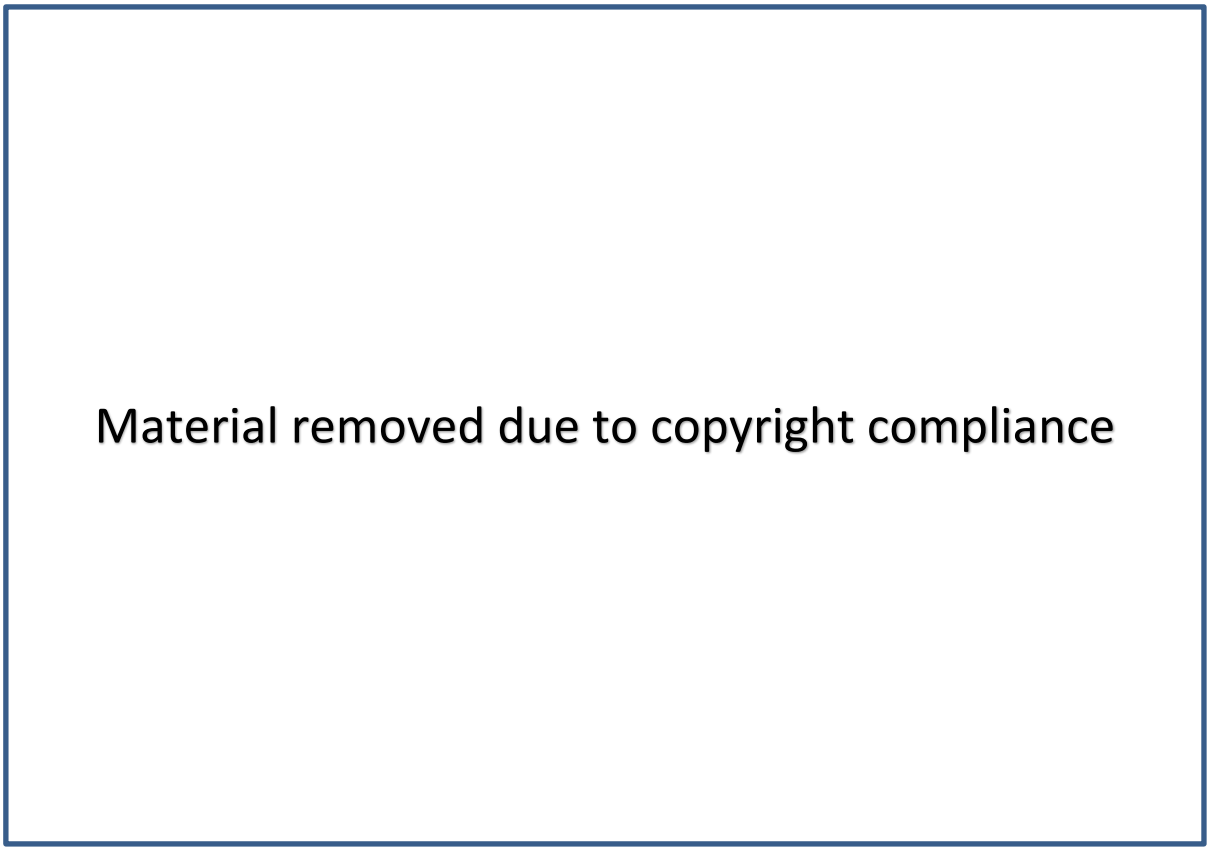
bottom lines are accountable for delivering both financial and social results, and for ensuring their dual performance objectives are complementary rather contradictory (Ebrahim et al., 2014). SEs risk 'mission drift' if their commercial and revenue gathering activities takes priority over their social mission and social value creation (Ebrahim et al., 2014). Accountability and transparency include monitoring the relationship between social and economic activities, monitoring manager performance, and establishing meaningful forms of downward accountability for members, employees, and the wider community who invest their time and resources (Ebrahim et al., 2014; Thompson & Doherty, 2006). Unlike traditional for-profit businesses that are investor owned, orientated, and driven; the democratic principles, stakeholder configuration, and community-based structures of SEs governance structures allow beneficiaries, funders, and partners to take greater part in the organisation's decision-making processes (Doherty et al., 2014; Huybrechts et al., 2014).

SEs have adopted a variety of legal structures to differentiate themselves from traditional non-profit and for-profit organisations. These legal forms include low-profit limited liability companies (L3Cs), benefit or public benefit corporations (BCorps), and social purpose companies (SPCs) (Kucher, 2021). Legal structures have emerged slowly over time and are developed to support SE organisations that balance dual-bottom lines (Ebrahim et al., 2014). In Europe, many EU members such as Italy and Greece have developed specific laws pertaining to SEs (Fici, 2016). Italy was the first country to pass laws in 1991 establishing a legal framework based around social cooperatives (Defourny & Borzaga, 2001). The United Kingdom adopted the Community Interest Company (CIC) in 2005 as an alternative legal framework for SEs (Nicholls, 2010). The framework was part of an initiative aimed to create an environment that accelerated growth of the SE sector (Nicholls, 2010). The CIC enhanced access to some forms of finance; provided limited liability and protection; gave flexible company structure; and was easier for organisations to set-up.

2.3 Differentiating between social enterprise, social entrepreneurship, and social enterpreneurs

Social enterprise, social entrepreneur, and social entrepreneurship are often used interchangeably (Grassl, 2012; Luke & Chu, 2013; Nicholls, 2008). Luke and Chu (2013) proposed there were important differences between the term's 'enterprise' and 'entrepreneurship'. It was suggested that enterprise refer to a commercial business activity, while entrepreneurship should refer to opportunity, innovation, and risk. Social entrepreneurship was defined as *"seizing opportunity for the market-changing innovation of a social purpose"* (Luke & Chu, 2013, p. 765). It was proposed SEs filled an important market gap but questioned whether all SEs were truly entrepreneurial. Dart (2004) also suggested that social entrepreneurs were the agents of change within the SE sector. These individuals identified and relentlessly pursued emergent opportunities that served the core mission, and engaged in continuous innovation, adaptation, and learning.

Brouard and Larivet (2010) proposed a theoretical framework that depicted the relationships between the three concepts (refer to Figure 2-1). It conceptualised SEs as organisations that pursued social missions or purposes that operated to create community benefit; social entrepreneurs were viewed as individuals that recognised new opportunities and found innovative solutions to social problems; and social entrepreneurship was seen as the activities and processes that created and sustained social value using entrepreneurial and innovative approaches. In general, social entrepreneurship focuses on exploiting market opportunities or developing processes that create innovative solutions to social problems, while social entrepreneurs are the agents driving the change (Corner & Kearins, 2013; Mair & Marti, 2006; Zahra et al., 2009).



Source: Adapted from (Brouard & Larivet, 2010).

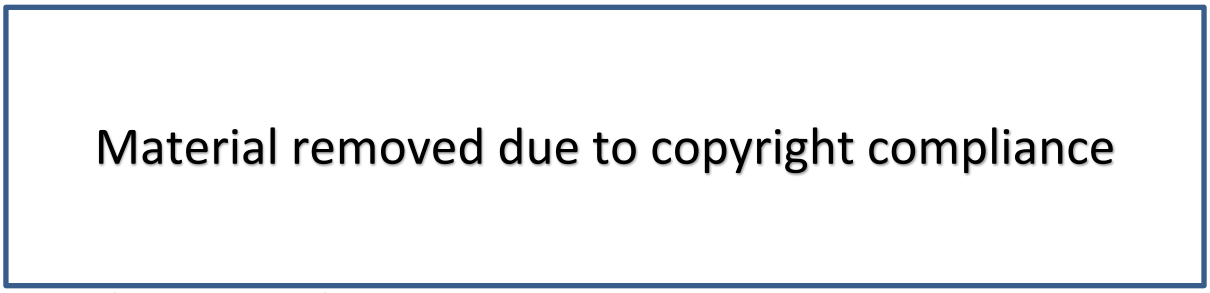
Figure 2-1 Theoretical relationships between social enterprise, social entrepreneurship, and social entrepreneur.

2.4 Social enterprise, hybrid organisations, and the traditional economic sectors

Over the last few decades there has been a convergence of the traditional private, public, and non-profit (voluntary) economic sectors in many countries around the world (Brueckner et al., 2010). Third sector non-profit organisations that act as welfare service providers have adopted more market-based approaches to fund their programmes. Similarly, private sector for-profit businesses have responded to growing stakeholder and consumer demands to engage in corporate social

responsibility and corporate citizenship (Tai & Chuang, 2014). This convergence has led to the blurring of once clear sectoral boundaries and given rise to hybrid organisations including SE (Eversole, 2013; Eversole et al., 2014).

These hybrid organisations often differ in their level of market reliance and can be placed on a continuum that ranges from purely philanthropic (socially driven) to purely commercial (profit-driven). Littlewood and Holt (2018, p. 3) stated 'hybrid organisations' could be thought of as organisational forms that were not "exclusively aligned with the idealised characteristics of either private, public or non-profit organisations". Alter (2007) believed there were four common hybrid organisations: non-profit with income-generating activities; social enterprise; socially responsible business; and corporations practicing social responsibility (see Figure 2-2). This provides a useful point of reference when differentiating between different organisational types.



Source: (Alter, 2007, p. 14).

Figure 2-2 Different types of organisations on the 'hybrid spectrum'.

Hybrid organisations generate both social and economic value, and can be organised according to their motive, accountability, and use of income (Alter, 2007). Organisations on the right-hand side of the spectrum are for-profit firms that create social value, but their central focus is profit-making and distribution to shareholders. Organisations on the left-hand side of the spectrum have commercial operations that generate economic value for social programmes; however, their central focus is accomplishing their core social mission as mandated by stakeholders. SEs are hybrid organisations that balance commercial and social missions; are mission-driven and employ market-driven methods; and seek to generate social and economic value (Defourny & Nyssens, 2017).

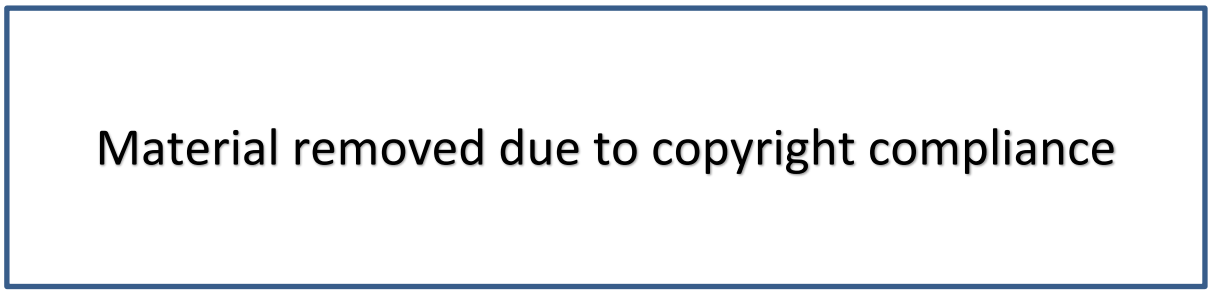
Economic value creation is frequently used to distinguish between the different hybrid organisations. Income generation and profit-making is the primary driving motive behind socially responsible business and corporations that practise social responsibility (CSR) (Camilleri, 2017). Alter (2007) believed organisations conducting CSR could not be classified as SE organisations, although their philanthropic activities may support them, make a positive impact, or contribute to the public good. Lindgreen and Swaen (2010) agreed with this position and found those engaged in some level of strategic philanthropic activity allowed them to maximise profits and market objectives, while also

contributing to good public works through grants, sponsorship, and volunteering employees. It was argued these activities sought to improve their public image, sales, and customer loyalty; however, were never the driving mission underpinning the organisation. Page and Katz (2010, p. 1388) also held a similar position stating:

> *"Although SE and CSR seem like fruits of the same tree, each draws some support from different and somewhat antagonistic sources and inclines in somewhat different - if not opposing - directions".*

Alter (2007) suggested non-profit organisations with income-generating activities differentiate themselves from traditional non-profits through the generation of revenue earnt by their commercial activities. Their activities usually make little in relation to their overall budget and fundraising efforts, and instead seek to recover costs from a service or fund an activity related to the organisation's social mission. The activities can also generate an income stream through membership fees, sales of products, publications, or consulting services. Alter (2007) argued in comparison the economic activity of SEs was strategic, had a long-term vision, and managed as a going concern. The organisation has a business plan with growth and revenue targets. It employed qualified staff with business or industry experience to manage the activity and provide oversight.

SEs can also be broken down further according to the level of integration of commercial activities with the social mission (Defourny & Nyssens, 2017; Grassl, 2012). Alter (2007) believed the level of commercial integration produced three distinct SE models: embedded SE, integrated SE, and external SE (see Figure 2-3). In embedded SEs, the business activities and social programmes are synonymous with the organisation achieving financial and social benefits concurrently. In integrated SEs, there is an overlap between business activities and social programmes. These SEs often support non-profits, acting as funding mechanisms that support the social cause. Indeed, the relationship between the two is regarded as synergistic as social and economic value is added to one another. Within external models the business and social programmes are distinct, and the SE funds the non-profit social programmes and operating costs. The relationship between the two is regarded as supportive as funding is provided to the parent non-profit group (Alter, 2006).



Source: Alter (2007, p. 18).

Figure 2-3 Level of integration between SE social programmes and business activities.

SE are types of hybrid organisations that pursue economic and social value creation, and as outlined these groups can take on a range of forms. There are differing perspectives on where they sit amongst the traditional sectors. There are some who argue the organisations represent an area of sectoral overlap, others believe they are a subset of one existing sector, while there are those that consider the organisations a sector in their own right (Brueckner et al., 2010). SEs when understood as a sector subset largely fall under the third sector, highlighting social value creation as the core of the organisation (Alter, 2007; Defourny & Borzaga, 2001). However, some believe SEs organisations could be subsumed by the private sector in their pursuit of economic value (Dart, 2004; Dees, 1996). Advocates of a cross-sectoral understanding of SE argue the organisations came from different origins, drivers, and contexts (Brueckner et al., 2010; Seanor et al., 2007). This approach highlights sectoral convergence since SE emerged from each sector (Aiken, 2006). Finally, SEs have also been viewed as part of an emergent 'fourth sector' that contains a range of hybrid organisations that fall outside the traditional sectoral boundaries (Brueckner et al., 2010). This approach argues these groups are distinct and require their own sector (Mendell, 2010).

2.5 Challenges to social enterprise growth and development

SEs have encountered a range of barriers that undermine their ability to pursue both commercial trading activities and their social and/or environmental mission (Davies et al., 2019). These constraints and challenges have included: poor access to finances and capital; ill-fitted legal structures; lack of clear identity; management tensions; and difficulties associated with measuring social value (Abramson & Billings, 2019).

It has been widely acknowledged organisations in the SE sector have struggled to attract, secure, and maintain access to the necessary financial support. Hynes (2009) examined the issues and challenges that growing SE encountered. The study identified SEs found it difficult to effectively convey the benefits and impacts of their organisation to development agencies, commercial partners and banking institutions, which often prevented them from securing crucial financial funding and support. Abramson and Billings (2019) noted a lack of clear understanding and trust of SE amongst

customers and funders inhibited their access to capital and finance. The study pointed to growing consumer skepticism around company's claims of social good, and increased ambivalence amongst funders towards the commercialisation of the non-profit sector. It was argued these conspired against SE obtaining the crucial and necessary financial support.

SE organisations have often had trouble fitting their organisations into the legal forms available to them (Abramson & Billings, 2019). SEs have adopted a number of legal framework and structures which have often varied country-to-country and across regions (Nyssens, 2006; Weaver, 2018). Ebrahim et al. (2014, p. 85) stated there "were no universally accepted rules and legal provisions regulating social enterprises at present". The most well-known forms include low-profit limited liability companies (L3Cs), benefit or public benefit corporations (BCorps), and social purpose companies (SPCs). These 'legislative experiments' were constructed to try and support firms that balanced social and economic missions (Ebrahim et al., 2014). These forms have conferred some benefits for their users, but still often failed to fully address the problems that spurred their creation (Abramson & Billings, 2019). The development of SE legal structures and frameworks have lagged behind in some regions and countries. Local organisations have often been limited to for-profit and non-profit categories, with some choosing to run multiple distinct entities that could run their social and commercial operations (Ebrahim et al., 2014). SEs in New Zealand have also been constrained by the legislative environment, where the current frameworks available have included: Limited Liability Company, Limited Partnership, Charitable Trust Board, Co-operative Companies, Incorporated Companies, Industrial/Provident Society and Māori Land Trusts (Ākina Foundation, 2018a). A report released by the Ākina Foundation argued "ill-fitting legal frameworks were not equipped to support trading and scalable businesses whose social benefit purpose was central to their existence" (Ākina Foundation, 2018a).

SEs have faced significant challenges due to the tensions that emerged from balancing a social mission with commercial revenue-gathering activities (Muñoz & Kimmitt, 2019; Stevens et al., 2015; Tian & Smith, 2014). Doherty et al. (2014, p. 425) believed SEs were "hybrid organisations, by definition, and sites of contradiction, contestation and conflict". Their success was dependent on overcoming often-paradoxical challenges that were associated with the simultaneous pursuit of social and economic missions (Tian & Smith, 2014). Smith et al. (2012) believed that if SEs were to succeed, their leaders needed to effectively manage the conflicting demands that emerged from their commercial and social focus. Some organisations successfully managed and accommodated their split personalities, while others resolved management tensions by drifting away from their defining purposes (Abramson & Billings, 2019). Doherty et al. (2014) proposed that SEs often encountered 'mission drift' when balancing dual bottom lines. SEs that concentrated on generating economic value often inadvertently focused less on generating social value and vice versa (Stevens et

al., 2015). It has been suggested this could be due to competition within the organisation for the limited resources available.

A lack of understanding concerning the concept of SE by financial and non-financial stakeholders and the general public is another challenge facing the sector (Defourny & Nyssens, 2008; Hynes, 2009). This has been perceived as a significant obstacle for organisations to overcome, and undermined the sector's ability to be recognised as a legitimate and an essential component of the wider business community (Hynes, 2009). Defourny and Nyssens (2008) argued the main problem encountered was the lack of acceptance and recognition of the SE concept. Abramson and Billings (2019) agreed stating SE novelty perpetuated misunderstanding amongst investors and consumers about who they were and what they did.

The measurement of impact and/or outcomes has been a major challenge for SEs (Abramson & Billings, 2019; Dees et al., 2008). SE groups have struggled to evaluate their social value and impact often leading to them to concentrate more heavily on financial measures (Abramson & Billings, 2019). The accurate measurement of social value has been recognised as a complex and difficult task. It has been made more challenging with an array of approaches, techniques, and measures available. One recent study identified over 70 different social impact assessment tools that could be used by SE (Grieco et al., 2015). In addition, SE must also demonstrate their profitability and social outcomes, which presents substantial challenges as it involves the collection and analysis of very different data types (Abramson & Billings, 2019). It has also been suggested that SEs are under greater pressure to justify their impact and prove their commitment to profit and purpose. Qian et al. (2019) noted the assessment of SE impact/outcomes was important for the sustainability and success of the organisations. The study identified several challenges hindered SEs undertaking impact assessments including limited time and financial resources, a lack of technical expertise, stakeholder expectations, high associated costs, and inconsistent measurement frameworks (Qian et al., 2019).

2.6 Social enterprise impact and outcomes

Existing literature has suggested SEs are useful tools for addressing a wide range of societal issues such as unemployment and homelessness (Cameron, 2010). The following section addresses existing research and evidence concerning the impacts and outcomes of SE organisations.

The activities and services provided by SEs can have positive impacts within communities (Kelly et al., 2019; Nyssens, 2007; Ridley-Duff & Bull, 2019; Roy et al., 2014). Roy et al. (2014) posited the business and commercial elements of SE could facilitate local economic development that addressed inequality known to underpin poor health and social outcomes. Munoz et al. (2015) posited SEs could be conceptualised as spaces of wellbeing that generated skills, confidence, and social networks for

individuals, and provided economic opportunities and civic interest for communities. It has also been found that SEs can benefit marginalised or disadvantaged groups. Lorenzo-Afable et al. (2020) examined individuals' experiences with SEs in developing countries. It was found beneficiaries valued their work and livelihood, fellowship with others, sense of belongingness, learning and personal growth. Henderson et al. (2019) assessed the impact of SE on older people In Scotland. It was pointed out the UK government's austerity agenda had reduced state funding for older peoples' social care. The study found SEs provided essential social care, employment, volunteering opportunities, community spaces, and access to healthy local food. This reduced social isolation and loneliness, improved eating and exercise habits, and increased cognitive stimulation.

The literature has shown SE organisations can seek to alleviate the social exclusion experienced by some people (Evans, 2007; Lloyd, 2002; Teasdale, 2010a). Social exclusion is often viewed as a multidimensional problem that can impact many different areas of a person's life. Teasdale (2010a) outlined social exclusion affected dimensions including consumption, production, political engagement, and social interaction (see Table 2-2). Džunić et al. (2018) linked social exclusion to unemployment, poor housing, low educational attainment, limited access to health services, reduced political participation, and reduced integration into social activities. Burchardt and Le Grand (2002) believed individuals were socially excluded if they could not participate in key activities within their society. A holistic approach was often required in order to reintegrate the excluded back into society (Džunić et al., 2018).

Table 2-2 Dimensions of social exclusion

Material removed due to copyright compliance

Source: Teasdale (2010a) adapted from (Burchardt & Le Grand, 2002).

There is an active debate on the impact SE has on social exclusion (Džunić et al., 2018). Some research has found organisations may reduce the social exclusion experienced by some people. Ho and Chan (2010) suggested work integration SES (WISEs) facilitated social recognition between marginalised participants and the wider community through the daily activities of doing business in the community. Barraket (2014) found that integration SEs had a positive impact on refugees, migrants, and the wider community. Participants were found to have developed new skills such as language acquisition, improved self-confidence and self-worth, and improved social connections. The research found the SE organisations facilitated new relationships between people and could act as community hubs that improved cross-cultural understanding through positive experiences and

representations of cultures. Kelly et al. (2019) examined the impact SEs had on loneliness and social isolation in rural communities. They were found to provide participants with increased reason and motivation to seek social interactions, and provided increased opportunities to meet new people and interact with others. It was claimed the increased social bonds and meaningful relationships, increased social inclusion and sense of belonging, and reduced sedentary behaviour. It is important to note the study did find SEs could also have negative impacts. Small workforce pools and a reliance on volunteerism, often led to burnout, stress and pressure to service the needs of the community (Kelly et al., 2019).

There have also been some serious questions regarding how effectively SEs can integrate the excluded into society, and combat different aspects of social exclusion (Džunić et al., 2018). Toner et al. (2008) believed SEs may have an impact on social exclusion, but argued they could not change the conditions that originally caused the exclusion. Teasdale (2010a, p. 104) building on this stated:

> *"…it became apparent that a person could be included within a group setting but remain socially excluded in relation to the country in which they live".*

It was pointed out the UK government at the time had stated SEs were useful tools for tackling social and economic exclusion. SEs were viewed as effective at delivering services, creating employment opportunities for excluded groups, and creating more enterprising communities. These impacts were linked by the organisations ability to generate social capital. Teasdale (2010a) suggested there was a lack of evidence to actually affirm or deny these claims. Similarly, an earlier public inquiry by the UK's House of Commons into the delivery of public services, found no evidence Third Sector organisations offered distinctive approaches benefits to users (House of Commons, 2008). The report titled 'Public Services and the Third Sector: Rhetoric and Reality' believed too much of the discussion was hypothetical and anecdotal. Smallbone and Lyon (2005) did however find some rural SEs provided service the private sector did not want to supply, and the public sector was unwilling to fund in full.

Despite uncertainty regarding their impact on social exclusion, many SEs do provide individuals who were at risk of permanent exclusion from the labour market with opportunities to work and engage with society through productive workplace activity (Aiken, 2007; Battilana et al., 2015; Ho & Chan, 2010; Vidal & Claver, 2004; Wry & York, 2017). Individuals typically come from groups or communities that experienced poorer social and economic outcomes in relation to the rest of the population, for example migrants, refugees, disabled persons and former inmates (Aiken, 2007; Maxwell & Rotz, 2017; Spear & Bidet, 2005). Employment-focused SEs seek to address these inequities through meaningful employment opportunities. Spear and Bidet (2005) believed the opportunities provided by these organisations could be an effective and innovative solution for

helping unemployed people back into the labour force. Chiaf (2011) also concluded the firms were important tools that could address inequality and disparity between groups of people.

Employment orientated SEs operate under a variety of forms, models, and labels around the world (Davister et al., 2004; Ho & Chan, 2010; Maxwell & Rotz, 2017). Qian et al. (2019) believed there were two main types of employment-focused SEs. The first was called 'intermediate labour market', and provided temporary training and transitional employment before the individual moved into other mainstream work. The second was called the 'permanent self-financed model' which provided employment for severely disadvantaged workers. The organisation was provided with subsidies that compensated the lower productivity of the workers. These subsidies were gradually reduced as the workers productivity improved (Maxwell & Rotz, 2017). It is unclear what proportion of the jobs created through SEs are filled by those from marginalised or excluded groups. Blackburn and Ram (2006) argued most jobs created in deprived areas were filled by those on the margins of exclusion rather than those most in need. This could be attributed to the higher costs associated with employing marginalised workers. Barraket (2014) argued high productivity costs associated with producing social value and maintaining financial sustainability, could led to the exclusion of individuals or groups where the associated costs were too high.

Participation in employment-focused SE organisations has been linked to positive impacts on mental health and self-esteem, social networks, confidence, skills, and social capital (Bertotti et al., 2011; Ferguson & Xie, 2008; Macaulay et al., 2018). Employment provided opportunities to connect people together and increased their sense of belonging (Akingbola et al., 2015; Kong et al., 2018). Qian et al. (2019) believed involvement with these organisations could offer a source of income that increased economic self-sufficiency, financial independence, and replicated 'real-world' employment. It was also suggested they could improve individuals' vocational and generalised skill base, levels of self-esteem, and sense of belonging. It posited the additional financial security provided through employment, could alleviate financial stress and reliance on welfare support, and increase peoples' ability to purchase goods and services (Qian et al., 2019). Rotz et al. (2015) believed SEs helped workers stabilise their lives, in particular their housing situation. However, it was posited SE employees could experience a financial loss after employment due to lost or reduced welfare payments. Ho and Chan (2010) believed SEs organisations provided disadvantaged groups with income, social connections, and enabled some to reintegrate back into society as productive workers. Kong et al. (2018) broadly agreed and believed SE organisations provided a safe environment to gain the pre-requisite skills needed to navigate and participate in society.

The immediate impacts and outcomes of employment-focused SEs have received some attention, but there has been little research conducted on their long-term implications. Maxwell and Rotz

(2017) outlined SEs that worked alongside those with significant barriers to employment were successful at increasing short-term employment, and could help reduce recidivism (reoffending) rates and welfare dependence. It was argued they were less successful in securing long-term employment for individuals from certain groups, for example, disabled people. The REDF organisation in 2010 released a 'Social Impact Report' that contained results of a longitudinal study which measured and evaluated SE employees over time (REDF, 2010). It found that people who were employed in any job six months after working at a SE were nearly twice as likely to be employed 18-24 months after being hired, compared to those not working six months after hire. It suggested supporting employees through the early stages post involvement with the SE was critical to their long-term employment.

Properly accounting for the 'Ashenfelter Dip' has been recognised as one of the main challenges associated with describing the financial outcomes of employment programmes (Ashenfelter, 1978; Heckman & Smith, 1995; Qian et al., 2019). The Ashenfelter Dip recognised that entrants to employment programmes had typically faced negative events earlier that impacted their employment which drove them to seek the programme in the first place (Qian et al., 2019). Ashenfelter (1978) observed that earnings of people in programmes showed a dip for about a year prior to entering the programme. Ashenfelter (1978) described how this phenomenon could falsely enhance the effects of employment programmes because individuals would have experienced improved outcomes even without the programme. Determining the effects of programmes using differences alone, often led to overestimated treatment effect. Correcting or adjusting for the dip and similar effects could be partially offset by using a comparatory group of similarly situated individuals who had been unemployed (Qian et al., 2019). Therefore, assessing the impact of employment-focused SEs required constructing the counterfactual outcomes that represented what would have happened in their absence (Heckman & Smith, 1999).

The literature has shown SEs can have a positive impact on individuals and communities; however, there has been limited empirical research that goes beyond basic quantification and considers the wider experiences of those who come into contact with the organisations (Munoz et al., 2015; Walk et al., 2015). The lack of research has prompted many to advocate and push for more studies around the area (Munoz et al., 2015). Lysaght et al. (2018) found most available research was largely descriptive, and criticised existing studies arguing they were insufficiently robust, and only provided anecdotal evidence about the impacts SEs have on individuals and society. Munoz et al. (2015) called for more research into any potential positive and negative outcomes of SE on participants and communities. It was argued these remained fuzzily defined and under-researched which prompted speculation about the extent to which claims were matched by reality (Munoz et al., 2015). Williams et al. (2016) advocated for tracking employment outcomes after SE work intervention to enhance

understanding around their long-term impacts. Thus, establishing causal mechanisms and relationships that link SE to their short and long-term impacts and outcomes remains a challenging but important objective within the literature (Roy et al., 2013).

2.7 Social enterprise in a global context

SEs have emerged from a variety of social, political and economic contexts in a number of countries (Barraket & Collyer, 2010; Defourny & Nyssens, 2010; Doeringer, 2009; Kerlin, 2010; Mendell, 2010; Ridley-Duff & Bull, 2015). Kerlin (2010) believed the general theme behind the emergence of SE lay in the weak social programs/funding that resulted from the retreat and poor functioning of the state (Kerlin, 2010, p. 167). It was pointed out the reduction of state social support during the 1980's and 1990's spurred the development of SE in the United States, Western and Eastern Europe and South America (Kerlin, 2010; Mendell, 2010). The loss of support in the US was attributed to a slowing economy which resulted in deficits that triggered cuts for non-profit organisations, and pushed them to seek commercial methods of generating revenue (Eikenberry & Kluver, 2004). Kerlin (2010) argued forces that influenced the emergence of SE could differ between countries and continents. In Eastern and Central Europe, for example, it was the demise of communism, while in Japan it was the government's inability to deal with pressing social issues. Doeringer (2009) also broadly agreed with some of these findings concerning the factors driving the emergence of SE around the world. The following section will provide a brief overview of the broader global context, and will look at the SE sectors in the United Kingdom, United States, Australia and New Zealand, (Barraket & Collyer, 2010; Defourny & Nyssens, 2010, 2012; Social Traders, 2016).

In the United Kingdom, the SE sector contains approximately 100,000 organisations and is estimated to contribute around 60 billion pounds or 3 per cent of annual GDP (Social Enterprise UK, 2020). Lord Victor Adebowale, Chair of Social Enterprise UK addressed the sectors importance stating:

> *"The public, politicians and experts all agree that we need to find a different way of doing business if we are going to balance growth with the needs of society. Fortunately, we have 100,000 social enterprises which are working to transform our society whilst boosting the UK's competitiveness. Their 60 billion [pound] contribution to the UK is too big to ignore and is just the start of something that the government must get behind. If it doesn't, there is a real risk that the UK will get left behind as other countries recognise social enterprise as the future of business" (Social Enterprise UK, 2020).*

The UK government has been a proponent of social impact investment, recognising strong financial initiatives and support structures are crucial to the development of the SE sector. In 2012, the

Cabinet Office established a large wholesale bank called 'Big Society Capital'. Former Prime Minister David Cameron stated:

> *"Social enterprises, charities and voluntary bodies have the knowledge, human touch and personal commitment to succeed where governments often fail. But they need finance too. They can get it from socially minded investors. But we also need social investment markets, social investment bonds and social investment banks. And here government needs to help" (Department of Internal Affairs, 2016, p. 36).*

The bank continues to provide access to capital and repayable finance which enables SEs to buy assets, innovate, expand, and improve their services (Big Society Capital, 2018). Their 2020 Impact Report showed social impact investment had grown from 830 million pounds in 2011 pounds, to 5.1 billion pounds in 2019 (Big Society Capital, 2020).

The SE sector has been described as 'relatively mature' in Australia (Barraket et al., 2017). The terms 'SE' and 'social entrepreneurship' were initially popularised by the Social Entrepreneurs' Network (SEN). Despite a long history there remains no single definition of SE in the country, while policy and regulation that supports the sector's development has been uneven across states (Barraket et al., 2017). In 2016, a report produced by the Centre for Social Impact and Swinburne University of Technology, estimated the Australian SE sector consisted of 20,000 organisations that operated across many different industries, contributing around 2-3 percent of the country's GDP (Barraket et al., 2010; Social Traders, 2016). Barraket et al. (2010) found SEs in Australia were 'multi-resource organisations' that generated around 85 per cent of their income from their commercial activities. Barraket et al. (2017, p. 355) outlined the nature of Australia's SE sector "reflects the role of an internally diverse civil society within an economically privileged society and is in response to an increasingly residualised welfare state".

Regional studies have provided further insight on Australia's SE sector (Duniam & Eversole, 2016). Eversole and Eastley (2011) conducted a baseline study of SE in Tasmania. Eversole (2013) published these findings in the article 'Social Enterprises as local development actors: Insights from Tasmania'. The SE community was found to have existed for years, spreading across multiple industries and local government areas. Tasmanian SEs was found to be diverse, characterised their work as cross-boundary, and had a shared vision of being recognised as valuable local development actors (Eversole, 2013). Eversole et al. (2014) explored the role of SE in rural community development in Tasmania. The research examined the outcomes of three SE case studies. The organisations were found to enhance food security, generate employment, strengthen communities, facilitate training, and stimulate the local economy. An earlier report commissioned by Queensland's state government

titled ‘Solving Employment Exclusion using Social Enterprise’, also highlighted SEs generated jobs for those who were otherwise excluded from the mainstream workforce; created businesses partially or fully funded through their commercial activity; and created new economic activity from those who would otherwise be unproductive (Queensland Government, 2012).

There is little comprehensive data available on the SE sector in the United States with estimates generally made using existing data sources, for example Inland Revenue Service (IRS) (Mendell, 2010). In 2010, the Social Enterprise Institute of Harvard Business School estimated there were around 1.5 million non-profit and other social ventures with annual revenues of around 700 billion dollars in the United States. The Social Enterprise Alliance outlined that SEs provided services around sports and recreation, substance abuse, employment, immigration and poverty, civil and human rights. There has been growing institutional support for the SE in the United States (Kerlin, 2009). Since 2008, five state-level SE legal forms were passed including: Benefit Corporation; Low-Profit Limited Liability Company; Flexible Purpose Corporation (now repealed); Social Purpose Corporation; and the Benefit Limited Liability Company (Weaver, 2017). In addition, attempts were made to pass federal legislation that would help develop the SE sector. In 2013, the Social Enterprise Ecosystem and Economic Development Commission Act (SEEED Commission Act) was introduced to Congress, however it failed to pass through Congress. In 2009, the Obama Administration created the Office for Social Innovation and Civic Participation that aimed to support SEs.

The New Zealand SE sector has developed steadily over the last decade, with relationships growing between the private and public sector. The government in 2014 released a position statement on SE stating:

> *“The government, through its agencies, commits to identifying any policy barriers to social enterprise growth and to work collaboratively to create enabling, supportive environment where more social enterprises can grow and attract investment” (Department of Internal Affairs, 2016, p. 21).*

It was recognised the SE sector could tackle persistent social problems, foster innovation, create employment and drive economic development, facilitate community-led solutions to local problems, and grow Māori economic activity. A subsequent partnership between the Ākina Foundation and the New Zealand government facilitated strong sector growth through the provision of financial and network support.

The Ākina Foundation outlined New Zealand SE organisations had a core social and/or environmental mission that benefited society; derived the majority of its income from a product or service; and used most of its profits to further its core mission (Ākina Foundation, 2018b). In 2019, Business and

Economic Research Limited (BERL) estimated there were 2,589 potential SEs operating around the country, and calculated the value of their social and environmental impact at $428 million and $327 million respectively (BERL, 2019). The research found SEs contributed primarily to three sectors: professional, scientific, and technical services ($136 million); agriculture, forestry and fishing ($124 million); and information, media and telecommunications industries ($122 million) (BERL, 2019).

The concept of pursuing broader goals and redirecting profit gained from business ventures to improving cultural, social, and environmental impact is a common practice within the Māori economy (McMeeking et al., 2017; Orhoevwri, 2021). The Māori economy has been growing steadily and is expected to continue to grow, with estimates that Māori assets could be worth around $100 billion by 2030 (McMeeking et al., 2017). The Ministry of Business, Innovation and Employment estimated that Māori enterprise in 2018 was worth between $40-50 billion (MFAT, 2018). Te Puni Kōkiri published a report titled 'Insights on Māori Social Enterprise' that sought to enhance understanding of Māori SE in Aotearoa, and inform key stakeholders on programmes/policies that could support Māori SE development (McMeeking et al., 2017). The report believed indigenous SEs could create innovative and locally responsive approaches to a diverse range of community needs, and argued they would support regional and Māori economic development. It argued iwi organisations such as Māori health, education, and social service organisations, Marae Trusts, Māori Land Trusts, and Whānau businesses fell under the banner of SE.

The growth and development of New Zealand's SE sector has been stimulated by several key initiatives. The Canterbury Community Trust following the 2010 and 2011 Christchurch earthquakes established a $2.5 million SE fund to support employment opportunities and encourage innovation and self-sufficiency (Grant, 2017). The large-scale redevelopment in Christchurch City and the wider Canterbury region following the natural disasters sought to provide spaces and facilities that would promote SE growth and development (Berno, 2017; Lewis, 2016). The Ministry of Awesome emerged to promote social entrepreneurs and innovators. Additionally, in 2014 the National-led government provided $1.27 million to the Ākina Foundation to work alongside start-ups and early-stage organisations and help them develop scalable solutions to social and environmental challenges. In 2018, it was made a strategic partner to the government in a three-year programme that was designed to develop the social enterprise sector in the country (Henare, 2017). As outlined in chapter one, the Social Enterprise Sector Development Programme sought to understand the conditions needed for a thriving SE sector; convey and demonstrate the impact of SE and how they align with government goals; reduce the legal barriers to growth and funding; and enhance the procurement opportunities available to SEs (Horan et al., 2019). It was argued this would help grow a flourishing SE sector in New Zealand.

2.8 Conclusion

This chapter has provided a broad overview of SE, laying the contextual setting for this thesis. It was found there is no universally accepted definition or defining characteristics of SE. Broadly speaking, SEs pursue a core social and/or environmental mission, supporting their efforts through commercial revenue gathering operations. The organisations balance dual-bottom lines; operate with unique business models; have high levels of accountability and transparency; and often have distinctive legal structures. SEs are hybrid organisations and are not exclusively aligned with private, public, or non-profit groups. This has contributed to the blurring of the lines between the traditional economic sectors. Their hybrid structure often produces unique challenges that affect their growth and development, in particular, management tensions and ill-fitted legal structures. SEs also often struggle to measure and report their social value or their impacts/outcomes. Existing studies suggest SEs can have a positive impact on individuals and communities. Yet, the lack of research has prompted some to speculate if these claims match reality. New Zealand has a fledging SE sector, and the partnership between Ākina Foundation and government has supported its growth and development. SEs are seen to be actively contributing to the market economy and the wellbeing of local communities around Aotearoa.

Chapter 3

The Market Economy, Wellbeing and the Capabilities Approach

3.1 Introduction

This chapter examines the relationships between the market economy, business, and wellbeing. It begins with an overview of economic development and looks at the progression of thinking around the theory of economic growth. It then briefly addresses the limitations associated with economic growth as a mechanism for improving the wellbeing of people. Wellbeing can be broadly understood as being able to lead a fulfilling life that has purpose, balance and meaning. This study uses Amartya Sen's capabilities approach (CA) to conceptualise wellbeing around the opportunities and freedoms available to people to lead lives they value and have reason to value. The approach has informed a broader shift towards a wellbeing-based approach to economics, and has been a guiding light for international efforts to improve the measurement of national wellbeing. The chapter explores the influence of the CA on economic development and its broader applications across literature. It gives a brief overview of domestic and international wellbeing frameworks. It closely looks at New Zealand's adoption of a wellbeing-based approach to economics, as seen with the emergence of the Living Standards Framework (LSF) and annual Wellbeing Budgets. These developments support a market economy and businesses that prioritise growth and profits alongside the creation of social value that expands the capabilities of individuals to achieve enhanced wellbeing.

3.2 Theory of economic growth

Economic development has traditionally focused on economic growth as the mechanism to drive improved wellbeing in a country (Todaro & Smith, 2009). Economic growth stimulates per capita income and employment which promotes upward social mobility for people (Islam et al., 2003). It contributes to reduced poverty rates, unemployment and health crises (Islam et al., 2003; Sharipov, 2015). It has often been viewed as an effective method for enhancing wellbeing when equally distributed to all sections of society and carried out in an environmentally sustainable manner (Islam et al., 2003; United Nations, 2016). As a result, economic growth has held considerable influence over government policy and decision-making due to its ability to enhance wellbeing and living standards (Causa et al., 2014; Cohen & DeLong, 2016; Dalziel et al., 2018; Lucas Jr, 1988). The theory behind economic growth has developed considerably over the years. The following section outlines some key developments around the theory of economic growth.

Adam Smith's work heralded the beginning of classical economics and signalled the end of earlier mercantile and physiocrat growth models (Mueller, 2014; Sharipov, 2015). Smith's theory of

economic growth was outlined in his seminal publication 'The Wealth of Nations' (1776). It critiqued mercantilism stating:

> *"Consumption is the sole end and purpose of all production; and the interest of the producer ought to be attended to, only so far as it may be necessary for prompting that of the consumer. The maxim is so perfectly self-evident, that it would be absurd to attempt to prove it. But in the mercantile system the interest of the consumer is almost constantly sacrificed to that of the producer; and it seems to consider production, and not consumption, as the ultimate end and object of all industry and commerce" (Smith, 1776, p. 179).*

Smith argued free trade markets generated wealth, and supported increasing production outputs through the division of labour and specialisation (Hill, 2007). Smith recognised the significance of division of labour for growth stating:

> *"…this great increase of the quantity of work which, in consequence of the division of labour, the same number of people are capable of performing, is owing to three different circumstances, first to increase the dexterity in every particular workman; secondly, to the saving of time which is commonly lost in passing from one species of work to another; and lastly, to the invention of a great number of machines which facilitate and abridge labour, and enable one man to do the work of many" (Smith, 1776 as cited in Ucak, 2015, p. 666).*

Rosenberg (1965, p. 127) believed Smith's work provided a masterful analysis of the gains from specialisation and exchange, which had a profound impact on subsequent economic thinking. Ucak (2015, p. 669) also believed one of the most important aspects of the Smithian growth model was increasing returns to scale by rising labour productivity that resulted from division of labour. Schumacher (2012) surmised the division of labour improved production; increased outputs; stimulated technological development; and enhanced the skills and productivity of workers, all of which promoted economic growth and increased the wealth of a nation.

Smith's growth models connected developments in international trade with increased production and the wealth of a nation (Schumacher, 2012; Ucak, 2015). It was reasoned that if trade was established with another nation, then division of labour could be extended through technical and organisation innovations, as the international market was larger than the domestic market alone (Schumacher, 2012). Smith also recognised international trade allowed for the transfer of knowledge

and technology between countries. This transfer could allow the development of new production related techniques that facilitated increased economic growth and wealth creation. Smith proposed international trade also encouraged greater competition between domestic producers and reduced the possibility of local monopolies, which he believed was beneficial for the public. It was conceded that international trade did not always benefit countries equally. Smith reasoned:

> *"When a rich man and a poor man deal with one another, both of them will increase their riches, if they deal prudently, but the rich man's stock will increase in a greater proportion than the poor man's. In like manner, when a rich and a poor nation engage in trade the rich nation will have the greatest advantage" (Smith, 1776 as cited in Schumacher, 2012, p. 62).*

David Ricardo, a classical economist, built on Adam Smith's earlier work, developing his own theoretical growth models. Ricardo published a major work titled 'An Essay on the Influence of a Low Price of Corn on the Profits of Stock', which laid out the law of diminishing returns as applied to labour and capital (Ricardo, 1815). This law stated that increasing the quantity of outputs would increase total production up to a certain point, but then would decline, as the land used was fixed in size (Formaini, 2004). It was reasoned that economic growth must decline and end sooner or later due to the scarcity of land and its falling marginal productivity (Formaini, 2004; Ruffin, 2002). Ricardo favoured an end to the Corn Laws arguing Britain should import it from countries better suited to its production. Ricardo's addressed this in the publication 'Principles of Political Economy and Taxation' where he outlined the concept of comparative advantage (Ricardo, 1817). It was argued nations should concentrate on industries where they were most competitive, that is able to produce goods and services at a relatively lower cost than other countries (Ricardo, 1817). Nations would not only export what they have an absolute advantage in producing, but also what they have a comparative cost edge in producing (Formaini, 2004). Ricardo's works influenced the thinking of subsequent economists, and was an important precursor to neoclassical economics (Harris, 2007).

Neoclassical economics built on classical economics which had focused on supply by including demand, thus meaning equilibrium could be found through the market. Engel (2010) outlined neoclassical economics placed an emphasis on consumption, demand and utility, as opposed to an emphasis on production, supply and costs. The concept of utility plays an important role in neoclassical economics. It is understood as a measure of relative satisfaction, and the utility of a good or service is the total satisfaction derived from consuming it (Brey, 2012). Neoclassical economists use marginal utility and market prices to help explain people actions in the economy. The principle of diminishing marginal utility argues the greater the supply of something, the lower the utility an addition unit brings (Horowitz et al., 2007; Janke, 2010). The neoclassical approach has

several underlying assumptions (Colander et al., 2004; Morgan, 2015). Firstly, people's preferences are rational, and these preferences can be identified through the value things have. Secondly, firms seek to maximise profits, while people attempt to maximise their utility. Thirdly, people use their free will to make decisions based on full and relevant information. Based on these assumptions, neoclassical economics believes that scare resources get allocated according to the principles of supply and demand. When market supply equals demand, the market is considered to be in equilibrium – that is, the decisions of all households and firms are consistent with one another (Janke, 2010). Alfred Marshall provided insights into 'partial equilibrium' analysis which focused on a single competitive market, and was illustrated with supply and demand diagrams in which demand decreases and supply increases with price (Janke, 2010; Marshall, 1890). The 'general equilibrium' analysis subsequently emerged which assessed the conditions that existed when all markets were simultaneously in equilibrium. The point of equilibrium could be described using the principle of pareto efficiency, which is a situation where nobody could be made better off without anyone being made worse off (Van Staveren, 2009). However, this is under assumptions including perfect competition and private goods that have no externalities (Dalziel et al., 2018). The neoclassical approach to economic growth confronts markets that often fail to meet the strict requirements for perfect competition to apply, while market transactions may involve externalities (Dalziel et al., 2018). In addition, markets do not deal with the distribution of equity either within or between generations of people.

John Maynard Keynes in the seminal publication 'The General Theory of Employment, Interest and Money' (1937) signalled the beginnings of the Keynesian and neo-Keynesian economic growth models (Keynes, 1937). Keynes asserted that aggregate demand, measured as the sum of spending by households, business and the government, was the most important driving force in an economy (Jahan et al., 2014). The Keynesian theories identified the importance of demand for economic growth. Inadequate demand could lead to periods of high unemployment. During periods of recession and declining aggregate demand Keynes advocated governments implement policy that simulated the economy. Reducing interest rates and increasing government spending on large projects could achieve these ends. State intervention was deemed necessary to moderate market fluctuations. Subsequent neo-Keynesian work provided models of economic growth trajectories and insights into the impact of investment on production capacities (Sharipov, 2015).

Joseph Schumpeter's work also contributed significantly to the development of economic growth models (Becker et al., 2012). Schumpeter introduced the concept of 'innovation' and its central importance to economic growth in his paper 'The Theory of Economic Development', where it was argued that resistance to innovation and entrepreneurship was detrimental to economic growth and development (Becker et al., 2012; Schumpeter & Backhaus, 2003). Schumpeter proposed economic

development was the carrying out of new innovative combinations (Sharipov, 2015, pp. 763-764). This concept was referred to as 'creative destruction' or 'Schumpeter's Gate' and was conceptualised during the 1950's (King & Levine, 1993). Shleifer (1986) defined the concept as a process where innovation and invention replaced old production techniques and products with better procedures, commodities and services. King and Levine (1993) in their widely cited paper 'Finance and Growth: Schumpeter might be right', investigated whether higher levels of financial development were correlated rate of economic growth, physical capital accumulation and economic efficiency improvement. The results confirmed a link between financial development and long-run growth as suggested by Schumpeter years before (King & Levine, 1993).

Economists continue to devote significant efforts to exploring how to cultivate economic growth. Solow (1956) in the seminal article titled 'A Contribution to the Theory of Economic Growth' proposed a neoclassical growth model. It demonstrates how nations often achieve higher levels of output per person if they have a higher rate of investment in physical capital such as factories and machinery (Dalziel et al., 2018). The model also shows output per person grows more quickly with higher growth in labour productivity. Solow found economic growth came from technological innovation. It was shown a country's ability to create, absorb and use new technology was the key to driving sustained growth (Solow, 1956; Dalziel et al., 2018).

Extensions to Solow's theories and neoclassical growth models have since emerged (Perkins et al., 2013). Investment in other types of capital such as human and knowledge have also been identified as important contributors to economic growth. Mankiw et al. (1992) showed education levels are an important factor influencing labour productivity. Knowles and Owen (1995) in the article 'Health Capital and Cross-country variation in Income per Capita in the Mankiw-Romer-Weil Model' also demonstrate good health is important for labour productivity. Paul Romer (1986, 1990, 1994) incorporated the idea that technological progress is influenced by the amount of effort devoted to producing new knowledge. His insights around knowledge signalled a new class of endogenous growth models. Romer conceptualises technological progress as growth in the stock of knowledge or ideas, produced by those specialised in research and development (Dalziel, 2019). It was assumed the amount of new knowledge produced was proportional to the existing stocks of knowledge. Revised models assume the rate of economic growth is linked to the proportion of knowledge workers in the labour force (Dalziel, 2019). Therefore, knowledge drives economic growth in ways that capital cannot. Non-rival in consumption, knowledge can sustain increasing returns in production, which is essential for growth. Jones (2019, p. 861) pointed this out stating:

> *"Throughout history – 25 years, 100 years, or even 1000 years – the world is characterised by substantial growth, both in the total stock of ideas and in*

the number of people making them. Because ideas are nonrival, this is all that is required for sustained growth in living standards".

William Nordhaus adapted the modern economic growth models to study climate change. Nordhaus alongside Romer was awarded the Nobel Prize in Economics for his work on integrating climate change into long-run macroeconomic analysis. He argued neoclassical growth models ignored important climate externalities in the growth process. Nordhaus was aware of the climate change threat well before most of his fellow countrymen and brought it to the attention of many economists (Fremstad et al., 2019). In a paper published in 1972, he outlined pollutants were entering the atmosphere at such a rate that it would result in the polar ice caps melting, which would cause the flooding of all the world's seaports (Fremstad et al., 2019; Tobin & Nordhaus, 1972). Nordhaus subsequently developed the dynamic integrated climate-economy (DICE) model which studies optimal climate policy. The model combined neoclassical growth modelled with a macro-geophysics model that described the effect of greenhouse gas emissions on global temperature and economic output (Fremstad et al., 2019). Nordhaus' work has been credited with helping to recognise that climate change is the greatest market failure the world had ever seen, and demonstrated there are planetary limits to unconstrained economic growth (Fremstad et al., 2019; Stern, 2006).

3.3 Limits to economic growth

Experience shows that economic growth cannot always be relied on to improve wellbeing. Nations can experience economic growth, and yet at the same time groups in the population may find themselves unable to maintain their material standard of living (Dalziel et al., 2018). Studies continue to find evidence that persistent production-based growth is costly and inconsistent with the planet's finite natural resources (Causa et al., 2014; Howarth & Kennedy, 2016). Dalziel et al. (2018, p. 9) believed that "it was no longer reasonable to presume that GDP growth, regardless of the nature of that growth, would increase wellbeing." This section addresses three limits to growth: exclusion of important wellbeing measures; environmental constraints; and social costs.

An exclusive focus of GDP growth neglects important economic activities and services crucial to human wellbeing, such as caring for children, and the provision of ecosystem services by the natural environment (Coyle, 2015; Dalziel & Saunders, 2015; Maxton, 2011). Perkins et al. (2013) outlined GDP growth excluded and did not account for the 'bad' that society produced such as crime, congestion and pollution. Marilyn Waring (1999, p. 1) in 'Counting for Nothing: What Men Value and What Women are Worth' addressed the exclusion of women within New Zealand's national accounting system stating:

> *"Hand in hand with the dismissal of the environment, came evidence of the severe invisibility of women and women's work. For example, as a politician, I found it virtually impossible – given the production framework with which we were faced – that childcare facilities were needed. 'Non-producers' (housewives, mothers) who are 'inactive' and 'unoccupied' cannot, apparently, be in need".*

Waring proposed that greater attention be focused on how men and women spent their time. It was recognised that people spent time working to pay for goods and services, and also spent time on non-market activities such as looking after family and personal leisure (Waring, 1999). Miranda (2011) argued household production was an important economic activity, and believed that between one-third and one-half of all valuable economic activity was not accounted for within traditional economic measures.

In addition, an exclusive focus on GDP growth can produce 'misleading indicators' around the people's wellbeing and support unsuitable policy decisions (Feldman et al., 2016; Stiglitz et al., 2009). In 2008, the Commission on the Measurement of Economic Performance and Social Progress was established by the former French President Nicholas Sarkozy. It produced a report outlining the time was ripe for measurement systems to shift from measuring economic production to measuring people's wellbeing (Jackson, 2010; Stiglitz et al., 2009). It was argued there was a growing gap in the information contained in GDP data and people's wellbeing that could have long-term ramifications (Stiglitz et al., 2009). The report understood GDP was a popular and widely accepted measure of economic activity, but recognised it was simply a measure of market production that had been applied as a measure of economic wellbeing (Stiglitz et al., 2009). There is growing recognition GDP growth faces limitations as a measure of wellbeing, and is unable to improve all dimensions of wellbeing (Dalziel et al., 2018; Maxton, 2011; Meadows et al., 2004).

The focus of modern economies on growth is having significant environmental implications (Ivković, 2016; Lewis, 2013; Meadows et al., 2004; Meadows et al., 1972; Stokey, 1998). Economic growth often relies heavily on the natural environment for the raw materials required as inputs for production, and services provided by ecosystems such as nutrient recycling and carbon sequestration (Everett et al., 2010). Everett et al. (2010, p. 13) stated that "economic growth at the current rate of depletion and degradation of environmental assets could not continue indefinitely". The seminal report 'The Limits to Growth' explored the relationships between rapid economic growth and environmental degradation (Meadows et al., 1972). It was concluded the environmental limits to growth would be reached within 100 years. It was argued economic activity based on production and consumption required increasingly large energy and material inputs, which required more extracted

natural resources and waste that would ultimately degrade the environment. In 2004, an updated report was published reiterating concerns with economic growth (Meadows et al., 2004). The ecological footprint of humanity was compared with the planet's carrying capacity, finding it was exceeded considerably. The report urged economic growth should be sustainable and not regarded as a 'perpetual mandate' (Meadows et al., 2004).

Economic growth has also been linked with negative social externalities such as rising inequality (Causa et al., 2014; Dalziel et al., 2018; Feldman et al., 2016; Rubin & Segal, 2015). Daly and Cobb (1994) believed economic growth was often accompanied with rising inequality. Their study introduced the Genuine Progress Indicator (GPI) as an alternative measure to GDP, and sought to capture the overall impact of economic activity on people's wellbeing (Stockhammer et al., 1997). It was suggested considerable growth in per capita income did not always generate corresponding increases in social wellbeing (Daly & Cobb, 1994; Howarth & Kennedy, 2016). Kubiszewski et al. (2013) reached similar conclusions, finding that although economic growth had increased three-fold since 1950, GPI had actually been declining since 1978. Causa et al. (2014) believed within most OECD countries that economic growth was associated with increasing income inequalities. The study concluded:

> *"Growth in GDP per capita had not fully tricked down to household incomes. In addition, growth had been unequal, as the gap between the growth rates of GDP per capita and household disposable incomes had been wider at the lower end of the income distribution" (Causa et al., 2014, p. 260).*

Rubin and Segal (2015) assessed the relationship between economic growth and income inequality. The study questioned whether all groups within society benefited from economic growth, as income generated through wealth was more sensitive to economic growth than income generated through labour. It was proposed this disproportionally favoured wealthy and high-income earners leading the study to conclude there is a positive relationship between economic growth and income inequality. In periods of rapid growth income inequality was to rise in the absence of government intervention (Rubin & Segal, 2015).

3.4 The market economy and wellbeing

The market economy can support human wellbeing through the provision and access to goods and services required to meet people's basic needs. It provides an unparalleled vehicle for meeting human needs through job and wealth creation (Porter & Kramer, 2011). The market economy enables individuals to expand their wellbeing far beyond what could have otherwise been achieved without them (Dalziel et al., 2018). Market economies have several distinctive features that have

enable them to enhance wellbeing including specialised production, innovation, decentralised decision-making, and pareto-efficient outcomes (Dalziel et al., 2018; Henderson, 2017). Markets favour division of labour and specialisation driving greater efficiency and worker productivity that contributes to improved living standards. The markets reward innovative behaviour as they stimulate growth within markets (Becker et al., 2012). Decentralised decision-making enables markets to respond to new products, innovations, and resource scarcity far quicker and more efficiently than any centralised organisation could manage. The markets can provide pareto-efficient outcomes that are appealing as they encourage decisions that are mutually beneficial for the wellbeing of people in society (Bishop, 1993). These features outlined show markets are strong mechanisms for supplying goods and services that can enhance wellbeing.

Although markets can be mechanisms that enhance wellbeing, they can also contribute to inequalities and negative externalities (Helpman et al., 2010; Postiglione, 2015). Purchasing power, which is a defining factor that determines access to market goods and services, often benefits the wealthy but leaves poorer individuals and families open to exploitation (Dalziel et al., 2018; Rubin & Segal, 2014). Markets also often fail to meet the perfect competition required for pareto efficiency due to externalities, public goods, or anti-competitive behaviour in the market, for example monopolies (Dalziel & Saunders, 2015; Dalziel et al., 2018; McGregor & Pouw, 2016). Therefore, strong institutional support and policy is critical to ensuring markets can continue to enhance peoples' wellbeing. John Millan (2002, pp. 13-14) addressed this stating:

> *"Markets, then, are the most potent anti-poverty engine there is – but only where they work well. The caveat is crucial. … Left to themselves, markets can fail. To deliver their full benefits, they need support from a set of rules, customs, and institutions. They cannot operate efficiently in a vacuum".*

Businesses are the engines rooms of the market economy facilitating economic development and growth (Galbraith, 2007). These organisations are traditionally driven by maximising profit and creating shareholder value, and contribute significantly to a nation's GDP and economic growth (Yunus et al., 2010). Oliver Hart (1989) in 'An Economist's Perspective on the theory of the firm' concluded firms were the primary 'engines of growth' driving modern capitalistic economies. Henderson (2004, p. 15) pointed out a direct driver of economic progress in recent times came from "profit related activities and initiatives from businesses working within the competitive market economy". Teece (2017a) agreed firms are the prime institution behind economic growth and development. Businesses contributes to economic growth which improves the material standards of living in many countries (Friedman, 2006).

Considerable thought has been devoted to understanding how businesses emerge and operate in the market economy. Ronald Coase's (1937) article 'The Nature of the Firm' sought to explain why businesses/firms co-existed within the modern economy, especially when the market allocated resources and co-ordinated activity so well. Coase proposed firms emerge when the transactional cost of co-ordinating production through market exchange are greater than within the firm. These market transaction costs stem from identifying market prices, negotiating transaction exchange agreements and risk contingencies (Hart, 2008). Oliver Williamson in the publication 'The Economics of Organisation: The Transaction Cost Approach' expanded on Coase's earlier work, and identified that common ownership in the form of firms helps solve some market failures by mitigating transaction costs and uncertainty (Williamson, 1981).

More recently, businesses have been conceptualised around their capabilities. David Teece argued firms were institutions that sustained two types of capabilities: operational capabilities, which are necessary for supplying to market the firm's chosen output; and dynamic capabilities (DCs), which drive entrepreneurial innovation within the firm and could be a source of competitive advantage (Teece, 1982, 2007, 2017a, 2017b; Teece et al., 1997). DCs assess how wealth is created and captured by firms which enables them to operate in the market economy (Teece et al., 1997). 'Dynamic' refers to a firm's ability to adapt to changes in the business environment. This requires innovative and strategic decision-making as technology is rapidly changing, while future markets and competition are hard to predict (Teece et al., 1997). Capabilities refers to strategic management that allows internal and external resources, skills, and competences to be adapted, integrated, and reconfigured in the face of a changing environment (Teece et al., 1997). DCs reflect the importance of knowledge capital and the crucial function of senior management in identifying and exploiting market opportunities. Dalziel et al. (2018) proposed firms operating in the market economy combine different capitals to develop and maintain their capabilities to deliver goods and services that are valued by their customer base. Firms can develop specialist or dynamic capabilities by bringing together different types of capital, for example knowledge, physical and economic capital. Knowledge capital in particular is an essential input for production systems and consists of intellectual property, trade secrets, customer relationship management systems, and other intangible assets based on specialised knowledge that is not easily copied or imitated (Teece, 2017b; Dalziel et al., 2018).

Business have traditionally been the primary means for people to work and earn an income that can be used to purchase valued goods and services. The provision of a job and steady income has been shown to have a positive impact on people's wellbeing (Binder & Coad, 2015; Lucas et al., 2004; Marmot & Bell, 2012). Paid employment provides direct benefits in the form of income, and indirect benefits such as social contacts, engagement in purposeful activities, and social status (Barraket,

2014). Qian et al. (2019) outlined employment has an impact on financial security, skill development, and social contact. Unemployed people have often reported lower levels of subjective wellbeing than those in employment (Burchell, 2011; Clark et al., 2001; Viinamäki et al., 1993; Winkelmann, 2014). Theodossiou (1998) explored the relationship between unemployment and mental distress using data from the 1992 British Household Panel Study (BHPS). It was found unemployed individuals were more likely to experience increased anxiety, depression, and loss of confidence and self-esteem (Theodossiou, 1998). Binder and Coad (2015) also found unemployment was often associated with a loss of personal identity, meaning, and self-esteem. Negative effects could also be compounded with reduced socialising and social connections. Winkelmann (2014) outlined unemployment depleted mental health and could lead to bad decision making. It was found that newly unemployed persons had a lower level of life satisfaction which was attributed to lost/reduced earnings, lost economic identity, a sense of personal failure, feelings of insecurity, and reduced self-confidence (Winkelmann, 2014). Individuals that experienced long-term unemployment carried a higher risk of some diseases and mental illness than those who had been unemployed for a short period of time (Herbig et al., 2013).

Research has shown employment alone does not guarantee improved wellbeing. The quality of employment has also been shown to affect subjective wellbeing (Lucas et al., 2004; Marmot & Bell, 2012). Although employment provides workers with opportunities to purchase valued goods and services, the job also needs to be secure and of a decent standard (Fisher, 2010; Marmot & Bell, 2012). De Neve and Ward (2017) found blue collar and low-income jobs were correlated with lower levels of happiness. The study also observed other aspects of employment such as work-life balance, autonomy, variety, job security, and health and safety risks affected happiness and life satisfaction (De Neve & Ward, 2017). Employment interventions have recognised that it is important not to assume having any job is more beneficial than having no job (Qian et al., 2019). Michael Marmot emphasised low-paid, insecure and health-damaging jobs carried risks to wellbeing outlining:

> *"Insecure and poor-quality employment was also associated with increased risks of poor physical and mental health… Work is good – and unemployment bad – for physical and mental health, but the quality of work matters. Getting people off benefits and into low-paid, insecure and health-damaging work is not a desirable option" (Marmot and Bell, 2012 as cited in Dalziel & Saunders, 2014, p. 36).*

Although businesses improve peoples' wellbeing, some also cause damage to communities. They can often exploit their workers in pursuit of greater profits, and provide employment that pays well below a living wage, depriving individuals and their families opportunities to purchase market goods

and services needed to achieve a certain level of wellbeing that is acceptable by societal standards (Agarwala, 2016; Smith, 2016). In addition, poor working conditions often mean workers are vulnerable to injury or illness. The collapse of Rana Plaza in Bangladesh killed hundreds in 2013, and highlighted the poor working conditions of garment workers working for large multinational corporations (Smith, 2016). Agarwala (2016) outlined firms avoided labour regulations against exploitation through complex employer-employee relationships. Firms also employed contract or causal workers forming an informal workers' class. Portes and Haller (2010) outlined these workers engaged in providing legal services and goods, but operated outside labour, health, and financial regulations allowing the continued exploitation of a cheap and flexible workforce (Agarwala, 2016).

The activities of firms and businesses also continue to cause significant environmental damage and depletion of natural capital (Jackson, 2009). An example of this are extractive industries that mine for rare earth minerals and fossil fuels (Anaya, 2015). Mining is a major economic activity that provides employment and income for thousands around the world, but both small and large operations have proven disruptive and damaging for the environment as they produce large amounts of pollutants and waste (Kitula, 2006). Mining has a number of stages and activities, which can also have potentially adverse impacts on societal and cultural heritage; the health and safety of mine workers; and communities located in close proximity to the daily operations (Kitula, 2006). Indigenous peoples have been especially vulnerable to marginalisation and the destruction of livelihoods, due to their reliance on land and resources that are susceptible to environmental damage from firms engaged in resource extraction (O'Faircheallaigh, 2013). For example, during the 1990's Papua New Guinea villagers were affected by pollution of the Ok Tedi and Fly rivers that had been caused by BHP's OK Tedi mine (O'Faircheallaigh & Ali, 2017). The mine released millions of tonnes of untreated mining waste into the rivers over several decades. It has been observed that indigenous communities are frequently living in poverty adjacent to mining complexes that generate large amounts of wealth for the firms, their owners, and national governments (Langton & Mazel, 2008; O'Faircheallaigh, 2013).

The industrialisation of the deep sea is expanding worldwide raising environmental concerns (Cordes et al., 2016). As technology improves, firms in the oil and gas industry are expanding into deeper water to extract rich deposits under the sea floor. Ultra-deep-water production (>1000metres) is increasing, particularly in the Gulf of Mexico, where major reserves are being accessed in water as deep as 3000m (Cordes et al., 2016). The extractive processes in deep water carry risks that can have severe environmental consequences. The Deepwater Horizon Oil Spill in 2010, for example, released 3.19 million barrels of oil into the ocean around the Gulf of Mexico, with over 2100km of shoreline and coastal habitats affected (Beyer et al., 2016; Fisher et al., 2016; Lamendella et al., 2014). Damage to natural capital stocks will continue to accelerate, diminishing the ecosystem services provided by the natural environment (Dalziel et al., 2018; Helm, 2015). Current trends suggest the global

economy will potentially multiply 16 times by 2100, causing more damage to natural capital stocks and the wellbeing of the global population. Significant investment in natural capital will be needed to off-set the damages caused by firms, and preserve/enhance the natural environment (Helm, 2015).

3.5 The capabilities approach and wellbeing

An alternative way of looking at economic development and wellbeing is through Amartya Sen's capabilities approach (CA). The CA gained attention as an alternative approach to evaluating and assessing wellbeing, economic development, social justice, inequality, and poverty (Dagsvik, 2013; Fukuda-Parr, 2003). The CA makes two distinctive claims: firstly, the claim that freedom to achieve wellbeing is of primary moral importance, and secondly, that the freedom to achieve wellbeing is to be understood in terms of peoples' capabilities and functionings (Sen, 1985, 1993, 2004). Sen proposed the space of capabilities was more appropriate for evaluating inequality than traditional utility, income, or commodity approaches (Saith, 2001). Since the lectures at Stanford University, the CA has received considerable attention. Sen has continued to develop the approach in subsequent publications across the humanities and social sciences (Sen, 1980, 1983, 1985, 1992, 1996, 1999). It provides foundational thinking behind wellbeing frameworks that guides policy-making decisions across many countries including New Zealand. This section outlines the development and application of the capabilities-based approach to wellbeing.

3.5.1 Origins of the capabilities approach

The CA was originally proposed as a broad ethical framework. It sets-out the freedom to achieve wellbeing is a matter of what people are able to do and be, and the kind of life they are effectively able to lead (Robeyns & Byskov, 2020). In Sen's original exposition, he argued income, utility, and primary goods were unsuitable approaches to wellbeing. The CA believes the possession of resources or goods does not always depict peoples' wellbeing accurately (Sen, 1979a, 1983, 1992). These approaches were considered problematic as they did not take into account the large interpersonal variations in personal characteristics, or the disparities in the natural/social environment that affected peoples' ability to use resources (Saith, 2001).

Sen set-out the need to move beyond resources and goods in the 1979 'Equality of What' Tanner lecture at Stanford University (Sen, 1979a). To illustrate this point, it was told that two individuals had the same set of resources, but one had a disability. It was argued the impact of disability could not be captured focusing solely on resources. The disabled person is unequal in terms of what they can do or be with their resources compared with the physically able individual. In addition, the disabled person is more worse off because they get the same amount of resource, despite having more expenses associated with the disability (Robeyns & Byskov, 2020). Another common example

was fulfilling the nutritional demands of an individual with a parasitic infestation of the intestinal tract. Other things being equal, such a person would require higher quantities of food, than someone without such an infestation (Robeyns & Byskov, 2020). The sole use of resources to compare these individuals would not likely pick up on these differences. Therefore, an assessment of wellbeing needs to consider not only the amount of resource available to a person, but also what they are able to do and be with them. The resource-based approach to wellbeing also failed to account for environmental factors such as pollution or prevalence of epidemics. These would likely affect the amounts of food and medicine required by people to break free of undernourishment or illness. In addition, the approach used market purchase data to assess wellbeing. It was reasoned not all commodities that contributed to wellbeing could be brought or sold, for example fresh air and the absence of crime (Saith, 2001).

The Basic Needs Approach (BNA) was a popular consumption and resource-based approach to wellbeing at the time. The BNA focused on a minimum standard required for a decent life. It defined wellbeing in terms of health, nutrition, literacy, and the goods and services needed to realise it such as shelter, sanitation, food, health services, sanitation, safe water, primary education, housing and related infrastructure (Deneulin, 2004; Reader, 2006). The BNA recognised income-focused approaches to wellbeing were insufficient as they neglected immaterial needs, and often failed to account for groups incapable of earning (Streeten, 1979). Robeyns (2017, p. 175) outlined the BNA was a practise and policy orientated approach:

> *"…that gives priority to meeting people's basic needs — to ensuring that there are sufficiently, appropriately distributed basic need goods and services to sustain all human lives at a minimally decent level".*

Sen (1984) initially critiqued the approach in his paper 'Goods and People', arguing it leaned too heavily on commodities, and viewed humans as passive and deprived. Sen believed it was too-input focused and did not connect wellbeing with peoples' capabilities. Sen (2017) reaffirmed the critique in his book 'Collective Choice and Social Welfare'. In order to assess people's wellbeing, furthur information was needed on other aspects of their lives such as their health, level of education, nutritional status, dignity and autonomy (Alkire & Deneulin, 2009).

Sen also found utility-based assessments of wellbeing problematic (Clark, 2005a; Saith, 2001). Utilitarianism evaluates an individual's wellbeing according to their sum utility (pleasure/happiness) derived from resources and goods. Sen believed there was more to life than maximising utility and argued an approach should be more focused on freedoms and choice (Renouard, 2011). In the article 'Utilitarianism and welfarism', Sen argued it was insensitive to the distribution of the total sum of individual's wellbeing (Sen, 1979b). It was also pointed out some people were better at producing

utility than others, which could lead to discrimination against individuals, for example, people with physical or intellectual disabilities, who were unable to convert the same resources into utility (Sen & Foster, 1997). These individuals would be discriminated against as they would be considered inefficient generators of utility, and instead more resources would be given to more efficient producers to increase total utility (Saith, 2001). Sen argued non-utility information had intrinsic value and was important for assessing people's wellbeing (Clark, 2005a). He was troubled that utilitarianism was not interested in the freedoms people held; considered only certain psychological aspects of owning material objects; and neglected the physical condition of people (Bénicourt, 2004).

Sen believed utility may lead to a misleading account of a person's wellbeing as it could be easily manipulated by mental conditioning and adaptive preferences (Clark, 2005b; Kynch & Sen, 1983). Sen addressed these concerns stating:

> *"The destitute are thrown into beggary, the vulnerable landless labourer are precariously surviving at the end of subsistence, the over-worked domestic servant work around the clock, the subdued and subjugated housewife is reconciled to her role and her fate, all have tended to come to terms with their respective predicaments" (Sen, 1999, p. 15)*

A poor and undernourished person, for example, may value a life that is more comfortable, but may resign themselves to their current state, be happy with small comforts, desire only what is deemed realistic, or attempt no desire at all (Renouard, 2011). Judged by the utilitarian metrics of happiness, satisfaction or fulfilled desire they may appear to be doing well although living in a deprived condition (physical condition neglect). The reflective aspect of the person valuing a particular life over another is also neglected (valuation neglect) (Saith, 2001). It was recognised there were similar issues when making interpersonal comparisons. When applying a utility approach, a happy person who was reconciled to a life of poor nutrition and low education, may rank higher than an unhappy person who was well fed and highly educated.

3.5.2 Core concepts of the capability approach

The CA entails two core claims: first, the claim that the freedom to achieve wellbeing is of primary moral importance, and second, that freedom to achieve wellbeing is understood in terms of people's capabilities, that is their real opportunities and freedoms to do and be what they have reason to value (Robeyns, 2016; Sen, 1980, 1985). The CA focuses on the quality of life that people can achieve (Dang, 2014). At the core of the approach is a commitment to conceptualise wellbeing around peoples' capabilities and functionings (Robeyns & Byskov, 2020). Functionings refer to achieved

states of 'being and doing' such as being healthy and being sheltered (Sen, 1985, 1992, 1999). Sen explained that functionings reflected the various things a person may value doing or being:

> *"The valued functionings may vary from elementary ones, such as being adequately nourished, and being free from avoidable disease; to very complex activities or personal states, such as being able to take part in the life of the community, and having self-respect" (Sen, 1999, p. 75).*

Capabilities referred to the opportunities and/or freedoms available to people to lead lives they value and have reason to value (Sen, 1993). They represent the effective freedoms of an individual to choose between different combinations of valued functionings. The concept of freedom is an integral aspect of the CA and underpins individuals' capabilities. A person's wellbeing consists not only of their achieved functionings, but also their freedom to achieve alternative functionings (Crocker & Robeyns, 2009). Sen emphasises the importance of assessing both capabilities and functionings. It is reasoned that examining only achieved functionings can mask very different capability sets available to people. Walker and Unterhalter (2007, p. 4) reiterated this stating:

> *"…although some cases may look as though the same functionings have been achieved, behind those equal outcomes may lie very different stories".*

The concept of 'conversion factors' was also introduced by the CA. It was addressed in 'Equality Re-examined' in recognition that the conversion of resources into functionings was dependent on certain personal, socio-political, and environmental conditions (Sen, 1992). Sen points out individual's freedom/agency is "inescapably qualified and constrained by the social, political and economic opportunities available" (Sen, 1999). The term is used to call attention to the variability in the translation of resources into capabilities or functionings (Dang, 2014; Goerne, 2010). There are a variety of conversion factors that can be grouped into personal, social and environmental categories (Robeyns & Byskov, 2020). Personal conversion factors are internal to the person, and refer to metabolism, age, gender, physical and mental conditions. Social conversion factors refer to societal factors such as public policies, social norms, institutions, gender roles, or power relations. Environmental conversion factors emerge from the physical or built environment inhabited by people, and refer to things such as climate, pollution, roading, or bridges.

The CA focuses on the diversity and heterogeneity that exists between people, and conversion factors show how much functioning or capability individuals can get out of goods and services; for example, how much mobility they can get out of a bike (Alkire & Deneulin, 2009). Dang (2014) outlined the bicycle (resource) displays the characteristics of transportation regardless of whether an owner is able-bodied or disabled. If the person cannot ride the bicycle because they are disabled

(personal conversion factor), or because the owner is female and societal norms do allow women to ride (social conversion factor), then the possession of a bicycle would not produce the functioning of mobility (Dang, 2014). The conversion factors show it is not sufficient to assess wellbeing according to the resources a person owns or uses; rather, we need to know more about the person and their living circumstances (Robeyns & Byskov, 2020)

The CA consistently argues that freedom and an individual's own values play a key role in assessing human development (Sen, 1999). An evaluation needs to consider the processes whereby individuals' outcomes are achieved, and the outcomes themselves (Hart & Brando, 2018). While persons' wellbeing is important, Sen observes that humans have values and goals other than wellbeing, and not all their activities are aimed at maximising wellbeing (Sen, 1985, p. 186). Sen conceives of wellbeing and agency as distinguishable, but equally important aspects of human life, each of which should be considered in our understanding of how individuals and groups are doing (Crocker & Robeyns, 2009; Sen, 1985). The approach argues people may pursue goals that reduce wellbeing. The concept of agency refers to what people do or can do to achieve goals, and not only those that advance or protect their wellbeing (Crocker & Robeyns, 2009).

Table 3-1 Wellbeing and agency in Sen's CA.

Material removed due to copyright compliance

Source: Adapted from (Crocker & Robeyns, 2009).

The CA sets out four key elements to help distinguish between these concepts: 'wellbeing achievement' and 'wellbeing freedom' which refers to peoples' wellbeing, and 'agency achievement' and 'agency freedom' which refers to peoples' goals (see Table 3-1). Keleher (2014, p. 56) outlined wellbeing freedom was "the freedom to achieve the beings and doings that are important"; and wellbeing achievements as "the quality of life an individual has achieved based on the beings and doings they have achieved." Keleher (2014, p. 56) outlined agency freedoms as "the freedoms to choose and bring about the achievements one has reason to value"; and defined agency achievements as "the realisation of goals and values a person chooses and has reason to value". Sen recognises people did not always pursue self-interest and enhance their own wellbeing, that is, they can also pursue altruistic activities that benefit others (Crocker & Robeyns, 2009; Keleher, 2014). Agency recognises people are not passive participants in their social environment, but are instead, capable of engaging and making choices about their futures (Alkire, 2008).

3.5.3 Critiques of the capability approach

The CA theory has attracted some criticism for its conceptualisation of wellbeing around capabilities and functionings. These often focus on its individualistic focus, difficulty to operationalise, perceived under-theorisation, and having the wrong priorities. The following section will address these criticisms that have been directed towards the approach.

Critics often cite the emphasis on individuals' effective freedoms as overly individualistic (Robeyns, 2017). It is reasoned the approach ignores groups and communities, and also ignores the significance and value of structures, communities, cultures, and institutions (Gore, 1997; Stewart, 2005). Stewart and Deneulin (2002, pp. 66-68) argued the CA was an example of methodological individualism stating:

> *"…the individualism of the approach leads us […], to a belief that there are autonomous individuals whose choices are somehow independent of the society in which they live".*

Dean (2009) also argued the CA was too individualistic and prioritised this over social solidarity, and the freedom to choose rather the need to belong. It was reasoned social structures tie individuals to families, communities and society which enable or constrain capabilities, and it was argued capabilities neglected human interdependency. However, he did acknowledge some supporters of the CA, do promote capabilities not exclusively premised on a self-sufficient individual (Dean, 2009). For example, Martha Nussbaum's list of central capabilities includes 'affiliation', which encompasses being able to live with and towards each other (Nussbaum, 2001).

The recurrent nature of this criticism is due to the strong focus on the individual, and their ability to lead a life they value and have reason to value. Robeyns (2017) observed the CA does attribute value to groups, communities, structures and institutions in so far as they enhance or diminish individuals' substantive freedoms. People's capabilities are enhanced and/or constrained in various ways by everything around them, for example, school systems, social services, labour markets, and climate change. Sen himself, analysed processes that were collective, such as his analysis of the households as sites of cooperative conflict (Sen, 1990). Dreze and Sen (2002, p. 6) furthur illustrated this point stating:

> *"The crucial role of social opportunities is to expand the realm of human agency and freedom, both as an end in itself and as a means of furthur expansion of freedom. The word 'social' in the expression 'social opportunity' […], is a useful reminder not to view individuals and their opportunities in isolated terms. The options that a person has depends*

> *greatly on relations with others and on what the state and other institutions do".*

The CA has also attracted some criticism for difficulties associated with its practical operationalisation. John Rawls (1999) in 'The Laws of Peoples: with the idea of Public Reason Revisited' considered if capabilities or primary goods should be the focus of evaluation. Rawls did not argue that primary goods were more important than capabilities, and explicitly acknowledged the opposite could be the case. Rawl's rejection of the CA appears to have been for pragmatic reasons, viewing the approach as too informationally demanding to be feasible (Burchardt & Vizard, 2011). Rawls (1999, p. 13) stated for the conception of justice to be realistic:

> *"…its first principles and precepts be workable and applicable to ongoing political and social arrangements … One of the main features [of primary goods] is that they are workable. A citizen's share of these goods is openly observable and makes possible the required comparisons between citizens (so-called interpersonal comparisons). This can be done without appealing to such unworkable ideas as people's overall utility, or to Sen's basic capabilities for various functionings".*

Sugden (1993) shared Rawl's sceptical position regarding informational limitations and the difficulties associated with the operationalisation of the CA. Key concerns related to the identification of valuable capabilities, weighting of capabilities, and interpersonal comparisons (Burchardt & Vizard, 2011). Sugden (1993, p. 1953) wrote:

> *"Given the rich array of functionings that Sen takes to be relevant, and given the extent of disagreement among reasonable people about the nature of a good life, and given the unresolved problem of how to value sets, it is natural to ask how far Sen's framework is operational".*

In the broader literature on the CA, the question of whether capabilities (as opposed to functionings) can be measured has been widely debated (Burchardt & Vizard, 2011). The sceptical position suggests that functionings are observable and measurable, whereas capabilities are not. For example, an individual's health status can be easily observed and measured, where as an individual's substantive freedom and opportunity to be healthy is less easily evaluated and compared, and for sceptics, this is an obstacle to the operationalisation of the CA (Burchardt & Vizard, 2011). Kuklys (2005, p. 7) understood there were challenges associated with operationalising the CA stating: "there are widespread doubts about the possibility of making actual empirical use of this richer and more complex procedure". However, despite these challenges believes it remains a useful approach.

The CA has also received criticism for a lack of detail and being under-theorised. Sen has been criticised for not specifying which capabilities matter and for not providing guidelines for the selection of capabilities (Robeyns, 2017). Sen (1999) reiterated he was abstaining from providing a list of capabilities so as to not influence or pre-empt debate around capabilities. In addition, Sen also argues it must be left to democratic processes and social choice procedures (Robeyns, 2017). Sayer (2012) believed the CA was a universalist theory and had been deliberately left vague. This had facilitated democratic debate and cultural interpretation that could allow its application in diverse contexts. In response, some argue without an objectively justified list of valuable capabilities it is difficult to identify where society should be aiming, and to assess how well a society was doing, or address its particular shortfalls. Sayer (2012, p. 582) believed while this vagueness was defensible for those reasons, it also creates "scope for more causal and indeed opportunistic appropriations and interpretations".

The CA has also received criticism for having the wrong priorities. It has been argued the approach downplays power and social structures, and diverts attention from the political economy of poverty and inequality (Robeyns, 2017). Koggel (2003) outlined the CA could be perceived to be insufficiently critical of the social constraints affecting people's actions, and did not give enough attention to global forces of power and systems of oppression. In other words, the CA did not provide sufficient attention to power inequalities (Robeyns, 2017). Pogge (2002) argued the CA overemphasised the role of national and local governments, and in the process neglected the large injustices perpetrated by the global economic systems and institutional structures, for example global trade rules. Jaggar (2002) also argued the CA should focus on the global economic order and the processes that explain rich country's role and responsibility in global poverty.

As outlined, the CA has received some criticism from academics over the years. Yet it has remained widely viewed as an approach that provides useful insight on peoples' wellbeing. The following section will address Martha Nussbaum's influential work on the CA.

3.5.4 Martha Nussbaum and the capability approach

The CA has been developed considerably since Sen first introduced the approach. In particular, Martha Nussbaum has made significant contributions to the CA, especially with the development of a partial theory of justice based on a central list of capabilities (Nussbaum, 2001, 2003, 2006, 2009, 2011; Nussbaum & Glover, 1995; Nussbaum & Sen, 1993). Sen and Nussbaum's approaches are closely related and united in their critique of theories such as utilitarianism. Robeyns (2005) outlined the two however differed on a number of issues, and that Nussbaum has advanced the CA in somewhat different directions to Sen's original exposition.

Nussbaum and Sen have most notably engaged in debate around how influences on wellbeing should be identified (Nussbaum, 2003; Sen, 2004). Sen argues for a democratic process, whereby members of each community exercise their own agency, and those outside should not impose their own choices on a community (Dalziel et al., 2018). Sen (1999, p. 11) outlined this position stating:

> *"With adequate social opportunities, individuals can effectively shape their own destiny and help each other. They need not be seen primarily as passive recipients of the benefits of cunning development programs. There is indeed a strong rationale for recognising the positive role of free and sustainable agency".*

Sen (2004, p. 80) later reiterated his position in a subsequent publication titled 'Capabilities, Lists and Public Reason: Continuing the Conversation', stating:

> *"To insist on a fixed list of capabilities would deny the possibility of progress in societal understanding, and would also go against the productive role of public discussion, social agitation and open debates".*

Nussbaum argues adequate social opportunities are not always available universally, and therefore believes Sen's assertions are not always realised (Dalziel et al., 2018; Robeyns, 2005). Instead, she argues that a list of central human capabilities can be designed to reflect the fundamental dignity of a human, while also being attuned to cultural differences and open to change. Nussbaum (2001, p. 77) outlined this position stating the list be considered:

> *"Open-ended and humble; it can always be contested and remade. Nor does it deny that the items on the list are to some extent differently constructed by different societies".*

Nussbaum's list is organised under ten themes that include the following: 1) body 2) bodily health 3) bodily integrity 4) senses 5) imagination 6) thought 7) emotions 8) practical reason 9) affiliation 10) other species 11) play and 12) control over one's environment (refer to Appendix A for a full description). The capabilities on the list are required for true human flourishing, and lives that lack even one of these capabilities fall short of a good human life (Nussbaum, 1999, pp. 41-42). It is argued governments should endorse all these capabilities. In addition, Nussbaum argues her work provides people with a justification and argument for principles (capabilities) they have a right to demand from their government (Robeyns, 2005).

3.5.5 Applications of the capability approach

The CA has been broadly applied across academic literature. It has been used to assess human development; small scale development projects; deprivation of disabled people; gender inequalities; provided theoretical and empirical analyses of policies; and critiqued social norms, practices and discourses (Robeyns, 2006). Comim et al. (2008) argued these applications matter, as they contribute to practical change, inform policy, reshape understanding and contribute towards a better understanding of social phenomenon and assessment procedures. It was believed the approach offers a distinctive multidimensional approach that stresses capabilities and functionings have intrinsic value. Robeyns (2006, p. 351) in the publication 'The Capability Approach in Practise' summarised this well stating:

> *"The core claim of the capability approach is that assessments of the well-being or quality of life of a person, and judgements about equality or justice, or the level of development of a community or country, should not primarily focus on resources, or on people's mental states, but on the effective opportunities that people have to lead the lives they have reason to value".*

This section will briefly address some applications of the CA including evaluations of poverty (Alkire & Santos, 2013; Anich et al., 2011); assessments of social interventions and programmes impact (Grunfeld, 2011; Schischka et al., 2008); and wellbeing assessments (Clark & Qizilbash, 2008).

The CA has been used in assessments of poverty (Alkire, 2007; Ataguba et al., 2013; Hick, 2012; Osmani, 2005; Schischka et al., 2008). The CA places the focus on what people are able to do and be, as opposed to what they have, or how they feel. Poverty is understood in terms of capability deprivation, and can vary as Sen has argued:

> *"…from such physical ones as being wellbeing nourished, being adequately clothed and sheltered, avoiding preventable morbidity, and so forth, to more complex social achievements such as taking part in the life of the community, being able to appear in public without shame, and so on" (Sen, 1995, p. 15).*

The lack of freedom and opportunities often mean communities and their constituents fail to achieve valued functioning states. The approach emphasises the importance of available opportunities and freedoms as opposed to the resources available to them. It focused on those who have impoverished lives and not just depleted wallets (Anand & Sen, 2000; Hick, 2012). The CA questions the central role that is often afforded to income in poverty assessments. Sen argues capabilities are intrinsically important, and that income is merely a means to such opportunities (Sen, 2009).

Advocates of the capability-based approach believe traditional resource-based approaches to poverty are problematic (Hick, 2012; Suppa, 2018). The approaches have been assumed to capture poverty well by ascertaining whether people are able to achieve minimum thresholds in a variety of dimensions such as nutrition, clothing, and housing (Alkire & Santos, 2013). However, critics point out the traditional measures of poverty are limited due to their focus on people's lack of resources (Hick, 2012). In some cases, important needs cannot be satisfied as the markets often work imperfectly, and require state or NGO intervention to provide goods and service such as clean water and education (Alkire & Santos, 2013; Rippin, 2016). In addition, the ability to convert resources differs greatly across individuals and households, for example those with disabilities. Therefore, not all people can access the goods and services they theoretically should have been able to access with their resources (Alkire & Santos, 2013; Rippin, 2016). As outlined, the CA uses the term conversion factors to refer to this variability translating resources into capabilities. The approach understands poverty as what people can do and be, as opposed to the resources they possess (Hick, 2012).

The CA has been used to assess the impact of programmes, projects and institutions (Anich et al., 2011; DeJaeghere & Baxter, 2014; Grunfeld, 2011; Schischka et al., 2008). Grunfeld (2011) assessed a Cambodian community-based information and communication project called iREACH. It was designed specifically to enhance capabilities and empower individuals by facilitating access to information and communication technology (ICT). The study implemented a participatory methodology and used focus groups to assess capabilities and functionings influenced by the programme. The research included 149 people including teachers, NGO representatives and fisherman. The iREACH project was shown to have enhanced capabilities related to health, farming, innovation, and education. Schischka et al. (2008) applied the CA to assess the impact of two poverty alleviation programmes. The study convened focus groups and used a discussion guide to assess changes in capabilities that resulted from program participation. The first programme was the Christchurch City Council's Community Gardens Programme which provided land to several community organisations for gardening. It was found the programme fostered capabilities that enabled them to lead healthier lives, learn new gardening skills, improve social connectedness, and boost their self-confidence. The second poverty alleviation programme was the Samoan 'Women in Business Foundation', which sought to promote female participation within business through financial and business management training. It was found the programme facilitated capabilities that enabled participants to improve family support, generate income, and contribute to their local community and church.

The CA has also evaluated the wellbeing of people, groups, and communities (Alkire, 2015; Clark, 2005b; Kato et al., 2017; Nussbaum, 2011). The CA emphasises the importance of opportunities, freedom and agency. These form the central focus in wellbeing assessments (Clark, 2005b;

McLoughlin et al., 2009). Naz (2016) found the focus on personal agency and freedom enhanced its appeal as a tool to evaluate wellbeing. Existing studies have examined the wellbeing of different people and groups including children (Hart & Brando, 2018); adults with disabilities (Ridley & Watts, 2013); indigenous people (Sangha et al., 2015); and rural communities (DeJaeghere & Lee, 2011). Sangha et al. (2015) found that traditional wellbeing measures were unsuitable for indigenous Australian populations who were embedded within natural systems. The study evaluated people's connections with natural resources using the CA and the Millennium Assessment approach to produce a 'hybrid socio-economic-ecological approach'. The novel approach incorporated intangible cultural and identity values with people's capabilities that involved natural systems (Sangha et al., 2015). The study concluded these capabilities enabled them to lead healthy and creative lives which had a positive impact on their overall wellbeing. Oni and Adepoju (2011) utilised the CA to assess the wellbeing of rural Nigerian people. Secondary data from the 2006 Nigerian Core Welfare Indicators Survey was analysed using the fuzzy set theory and logistic regression. The study concluded conversion factors influenced the capabilities available to people to lead lives they valued and had reason to value.

Thus, the CA has been applied to assess concepts including poverty, wellbeing, and inequality (Comim et al., 2008). Applying the approach means confronting the operationalisation frontier. Translating the theoretical richness into practical application remains one of the most challenging aspects of the CA (Comim et al., 2018). This section has briefly outlined several studies that have practically operationalised the approach to assess individual's wellbeing, poverty, and the impact of programmes.

3.5.6 The capability approach and economic development

The CA has broadened economic development by advocating its primary purpose is to enhance wellbeing through the expansion of people's capabilities (Sen, 1979a, 1980, 1985, 2005). Sen believed rising incomes and growth rates are important but are insufficient as they focus on meeting people's material needs, and neglects their 'rights, freedoms, and human agency (Fukuda-Parr, 2003). In the paper, 'Development: Which Way Now?' Sen stated:

> *"Ultimately, the process of economic development has to be concerned with what people can or cannot do, e.g., whether they can live long, escape avoidable morbidity, be well nourished, be able to read and write and communicate, take part in literary and scientific pursuits, and so forth" (Sen, 1983, p. 754).*

Sen believes economic development should shift from the promotion of growth to the promotion of wellbeing, which is to be measured through persons' capabilities (Stiglitz et al., 2009).

The theoretical foundations of the CA can be found embedded in several important economic development initiatives (Kusago & Kiya). Perhaps one the most influential and long-lasting of these is the United Nation's Human Development Report (Schischka et al., 2008; Stanton, 2007; United Nations, 2016). The report shifted the focus of development from the pursuit of material wealth to enhancing peoples' wellbeing; from income maximisation to expanding peoples' capabilities; from optimal growth to expanding freedoms (Jahan, 2017). "It focused on the richness of humans rather than on simply the richness of economies, and in doing so changed the lens for viewing development results" (Jahan, 2017, p. 2). The United Nation's reports clearly define human development as a process of enlarging peoples' choices and the freedoms to do so. They emphasise that capabilities (opportunities and/or freedoms) extend much further and encompass human rights, equality, and political freedom (Klugman, 2010). The reports utilise the CA to understand peoples' wellbeing, and propose the standard of living is more important than material wealth and income (Stanton, 2007). The report has established the Human Development Index (HDI) which weighted income against purchasing power, life expectancy, education and health (Kusago & Kiya, 2009; Schischka et al., 2008). The HDI is a summary measure that assesses the long-term progress in three basic dimensions of human development: a long and healthy life, access to knowledge, and a decent standard of living (Stanton, 2007).

The CA has also influenced economic development policy at a regional, national and global level. Robeyns (2005) outlined the CA was a framework that helps to design and evaluate policies, ranging from welfare policy in affluent states, to development policies by governments and non-governmental groups in developing nations. Sen argues economic development policy should focus on what individuals are able to do and be, and remove barriers so have freedom to lead lives they value, and have reason to value (Robeyns, 2005).

The 2008 commission led by Joseph Stiglitz, Amartya Sen, and Jean-Paul Fitoussi outlined greater emphasis was needed to be placed on measuring people's wellbeing, rather than through indicators (GDP) of economic growth and performance (Stiglitz et al., 2009; Dalziel et al., 2018). The report supported the development of indictors and frameworks that assessed the relationship of wellbeing and economic development (Stiglitz et al., 2009). The commission leaned on Sen's work around capabilities, which was one of the main theoretical frameworks applied by the group. The report acknowledged the central importance of peoples' ability to pursue opportunities they valued and had reason to value, and the importance of establishing an economic model that rejected profit and growth at the expense of relationships, wellbeing and the environment (Stiglitz et al., 2009). Since

the establishment of the commission many organisations and countries have introduced frameworks to assess the wellbeing of people.

The Organisation for Economic Co-operation and Development (OECD) has broadly defined economic development as the process whereby a nation improves its economic, political, environmental and social wellbeing. The definition reflects a growing consensus that economic development did not just seek improvement in personal income and national GDP; but also sought to enhance individual's wellbeing, through improved standard of living, access to health and education, and environmental sustainability (United Nations, 2016). In 2011, the OECD established the 'Better Life Initiative', which sought to support policies, projects and initiatives that improved peoples' wellbeing. As part of the initiative, it developed a wellbeing framework that assesses quality of life, material living conditions, and sustainability. Durand (2015, p. 8) outlined the framework was as rooted in the CA and pointed out peoples' functionings and freedom to choose between different sets of functionings was what mattered. The framework focuses on people, acknowledging economic assessments of a country can be quite different to the wellbeing experiences of their citizens and communities (Durand, 2015). It covers outcomes at the individual, household and community level. The framework assesses 11 dimensions of current wellbeing including: income and wealth; work and job quality; housing; health; knowledge and skills; environment quality; subjective wellbeing; safety; work-life balance; social connections; and civic engagement (Durand, 2015). The systemic resources that underpin future wellbeing over time are expressed in terms of four capital stocks: natural capital; social capital; economic capital; and human capital (OECD, 2020). If these stocks decline over time wellbeing is likely to be adversely affected. In addition to considering these capital stocks and flows, the framework also highlights key risk and resilience factors that might affect these in the future (OECD, 2020).

In 2013, the German parliament opened dialogue with the general public around wellbeing. A coalition agreement released by the governing parties stated:

> *"We wish to align our policies more closely with the values and hopes of German citizens and we will therefore conduct a dialogue with them in order to gain an understanding of their views on quality-of-life issues. […] We will use this dialogue as a basis for developing a system of indicators for reporting on the quality of life in Germany. This system will provide clear and understandable information at regular intervals on wellbeing in Germany and the progress made with efforts to improve it" (German Federal Government, 2017, p. 3).*

The German government made it clear policies directed around economic growth and prosperity were no longer enough to enhance the wellbeing of its people (German Federal Government, 2017). Policymaking would pursue economic, social, and environmental objectives simultaneously. A national wellbeing framework was introduced and consisted of 12 dimensions of wellbeing. These were arranged at a personal, societal and national/global level with 46 indicators that would measure them. Five dimensions related to peoples' living conditions included: health, work, education, time available for families, and jobs/recreation. A further three dimensions related to society, safety and freedom, housing in urban and rural areas, and interaction with fellow people. Another four dimensions related to the nation and world: societal co-existence, strong economy, preserved environment, democratic political system, and acting responsibly within a global setting (German Federal Government, 2017). The framework emphasised a shift from more material goods to quality production and distribution, while also improving the opportunities and freedoms of people to lead good lives (German Federal Government, 2017).

In 2004, the Australian Treasury introduced a wellbeing framework. It was established to provide guidance on policy that would improve the wellbeing of the Australian people. It conceptualised wellbeing as the substantive freedoms available to lead a life they have reason to value (Gorecki & Kelly, 2012). The framework was concerned ultimately with the wellbeing of individuals and the things that mattered to them such as friends, family, community, and the natural environment (Gorecki & Kelly, 2012). The framework also considered the preservation of human, physical, social, and natural capital stocks as crucial to generating and sustaining intergenerational wellbeing. The framework consisted of five dimensions including: the opportunities available to people; the distribution of these opportunities across people; the sustainability of opportunities available over time; the overall level and allocation of risk held by people and community; and the complexity of choices facing people and communities (Gorecki & Kelly, 2012).

New Zealand has also established a wellbeing framework that seeks to inform policy. In 2011, the Treasury department began work on a living standards framework (LSF). Karacaoglu (2015) identified strong influences of the CA within the LSF, and argued good public policy should seek to enhance the capabilities and opportunities of individuals to pursue lives they had reason to value. Hall (2019, p. 36) in 'New Zealand's Living Standards Framework – what might Amartya Sen say?' stated the CA was a guiding light for international efforts to improve the measurement of national wellbeing. The paper observed the approach had influenced thinking behind the development of the LSF.

The LSF promotes policy that will help achieve higher living standards for all New Zealanders and enhance intergenerational wellbeing (Karacaoglu, 2015). It helps inform government ministers and agencies on the growth and sustainability of capital stocks; social and demographic wellbeing

inequities; and the impact of resource allocation decisions on short and long-term wellbeing (New Zealand Treasury, 2018c). The LSF is accompanied with a dashboard that informs Treasury's advice to government ministers on priorities for improving wellbeing. The dashboard consists of outcome indicators placed under three categories: our country, our future, and our people.

The framework recognises sustainable intergenerational wellbeing requires preserving and investing in natural, human, social and physical/financial capital stocks, as they provide services important to sustaining and improving wellbeing (Dalziel et al., 2018; Durand, 2015; OECD, 2020). Natural capital refers to the natural environment which provides resources and ecosystem services that support human activity and wellbeing. Human capital refers to the knowledge and skills gained through education, courses, training, and experience (Côté & Healy, 2001). People can use these skills within employment or for their own enjoyment (Dalziel et al., 2018). Social capital refers to norms and values within society. Physical capital refers to assets such as buildings, roads, industrial work etc; while financial capital refers to shares, bonds, securities and cash etc.

Other capital stocks are also regarded as important for intergenerational wellbeing. (Dalziel et al., 2018) has argued cultural, knowledge and diplomatic capital are important to sustainable intergenerational wellbeing, and should be incorporated into the LSF. It is argued the creation and utilisation of knowledge capital is a powerful driver of human wellbeing (Dalziel, 2019). Paul Romer's endogenous growth theory shows knowledge is an essential driver of growth in material standards of living since it serves as a capital stock that improves labour productivity in delivering market goods and services. Knowledge capital does not rely on material resources, unlike natural or physical capital. Knowledge creation is seen as an economic public good, that creates important opportunities to expand capabilities for wellbeing through policies that nurture the growth and use of knowledge (Dalziel, 2019; Stiglitz, 1999). It is non-rival in consumption meaning the same knowledge can be used simultaneously by any number of people with the necessary prerequisite human capital (Stiglitz, 1999). This means the use and discovery of new knowledge has the potential to be beneficial for wellbeing, while respecting the physical limits of the planet (Dalziel, 2019).

The capitals approach to sustainability has attracted some debate within literature. The debate centres around whether the economic system can be viewed as sustainable if a capital stock is declining overtime, but other capital stocks are increasing (Dalziel et al., 2018, p. 41). This is especially pertinent with respects to the loss of natural capital because of environmental degradation or resource extraction. Two schools of thought emerged around the concepts of 'weak sustainability' and 'strong sustainability' (Ayres et al., 2001; Neumayer, 2003). Strong sustainability is built around the concept that natural capital cannot be substituted with other types of capital, and that some human activities have irreversible implications (Pelenc et al., 2015). It is argued the economic system

is not sustainable if natural capital cannot be maintained or preserved. Strong sustainability on the other hand is focused on non-decreasing natural capital (Gutés, 1996, p. 147). 'Weak sustainability' is built around the concept that natural capital and other capital types can be substituted, and that technological innovations and compensation can alleviate a degraded environment (Pelenc et al., 2015). Those that hold this position argue there is little difference in wellbeing generated by different types of capital, so long as the total value of capital stocks are maintained or increased for the following generations (Pelenc et al., 2015). Pearce and Atkinson (1993) stated an economy was sustainable if the savings rate were greater than the depreciated value of natural and manufactured capital types. Sustainability was therefore focused on non-decreasing total capital stock (Gutés, 1996, p. 147).

Government and public policy can enhance wellbeing by investing in different capital stocks. This has often focused on growth and investment in physical capital which enhances material living standards which is important to wellbeing. Although this is important it is recognised this is often accompanied by negative social and environmental externalities such as inequality and anthropogenic induced climate change (Meadows et al., 2004; Rubin & Segal, 2015). Dalziel et al. (2018) has suggested investment across seven types of capital enhances wellbeing outcomes at different levels of human choice, and expands the capabilities of people to lead lives they value and have reason to value. Thus, a wellbeing economics framework is not only for those working in local and national government; but also, for individuals, families, and communities, civil institutions, and firms in the market economy (Dalziel et al., 2018).

3.6 Conclusion

This chapter has explained two major themes for the research reported in this thesis. Firstly, it has outlined that focusing solely on economic growth, while important, at times can fail to enhance all dimensions of wellbeing. Consumption-based economic growth can be unsustainable and has been linked to negative externalities that can be harmful to societal wellbeing and the natural environment. This chapter has shown that businesses are the engines of the market economy and deliver valued goods and services, and can enhance wellbeing through employment, income and social connections; however, have also been responsible for undermining wellbeing. As mentioned in chapter 2, SEs are hybrid organisations that bring together aspects of the traditional for-profit and non-profit sectors. SEs are broadly defined as organisations that pursue a core social and/or environment mission; and whose majority of income is derived from commercial revenue gathering ventures, which is used to support the fulfilment of their core purpose and mission. The organisations have been suggested to play an important role in enhancing the wellbeing of people and communities.

Secondly, this chapter has addressed the CA which has made important contributions to thinking around a wellbeing-based approach to economics. Amartya Sen introduced the approach arguing wellbeing should be conceptualised around individuals' capabilities and functionings. Capabilities refer to the opportunities and/or freedoms available to people to lead lives they value and have reason to value. Functionings refer to achieved states of being and doing. This chapter also highlighted the approach had been broadly applied across literature despite facing operational challenges. It has facilitated assessments of programme impacts and wellbeing assessments. It also informed some of the philosophical foundations of New Zealand's Living Standards Framework and Wellbeing Budget. This chapter drew attention to the capabilities-based approach to wellbeing, and suggests that people's wellbeing should be evaluated according to the opportunities and freedoms available to them to lead lives they value and have reason to value. Building on these two themes, chapter 4 will address relevant literature pertaining to the CA and SE.

Chapter 4

Reimagining Social Enterprise Social Value around the Capabilities Approach

4.1 Introduction

Social enterprises (SEs) are hybrid organisations that occupy the position between traditional non-profit groups and for-profit businesses. The organisations pursue both a social mission and commercial revenue gathering activities (Barraket et al., 2010). SEs generate social value through the pursuit of their core mission. A wide range of approaches have been applied to assess the social value or the impacts and outcomes of their activities. This chapter reviews the literature that addresses the conceptualisation of social value and the approaches used to assess it. Typically, these approaches have focused on calculating a return on investment and assigning monetary values to non-monetary outcomes and/or impacts. This chapter argues the CA offers an alternative lens for conceptualising SE social value and is well suited for capturing the experiences and perspectives of their beneficiaries. As outlined in chapter 3, the CA is an important foundational theory that has guided the development of wellbeing economics and policy frameworks. The approach has been applied across a broad range of disciplines and has been used in a variety of research contexts. The approach advocates wellbeing should be conceptualised around individuals' capabilities and functionings. Capabilities refer to the opportunities and/or freedoms available to people to lead lives they value, and have reason to value. Functionings refer to states of being and/or doing which individuals are able to achieve. This chapter reviews the literature that has applied the CA within the context of SE. Thus, this chapter is able to identify the key themes and knowledge gaps that emerge, providing context for the direction of this research.

4.2 Social enterprise and social value

SEs have operated within traditional commercial markets while addressing their social and/or environmental mission. During their operations they have generated economic and social value (Nicholls, 2007; Murphy & Nixon, 2022). Unlike economic value which has traditionally been easily measured and understood, social value has presented a more challenging prospect to define, measure and convey for both practitioners and academics. The creation of social value often places additional financial burdens on SE organisations, as there are additional expenses that are not typically seen in traditional businesses (Davies et al., 2019). Employment-focused SEs, for example, often incur additional expenses as they employ workers that may lack sufficient training, education, and skills. The pursuit of a social mission often places SE organisations at a disadvantage with

traditional for-profit competitors (Nicholls, 2007). These additional costs of generating social value can be partially offset by effectively communicating outcomes and impacts. In addition, effectively conveying these are also important for capital investment; securing contracts; differentiating from competitors; convincing consumers to purchase their goods and services; and maintaining legitimacy in the face of heightened demands for accountability, auditing, and more comprehensive impact measurement (Costa & Andreaus, 2020; Kato et al., 2017; Ryan & Lyne, 2008). Listen-Heyes & Liu (2021) outlined that effectively communicating social value to external stakeholders could help provide a competitive advantage in the tender of public sector contracts and grant applications.

Social value has been recognised as an important feature of SEs, however, there remains some disagreement around its definition (Agafonow, 2015; Birkhölzer, 2009; Ebrahim & Rangan, 2014; Emerson & Twersky, 1996; Kato et al., 2017; Kah & Akenroye, 2020). The disagreement has arisen in part due to differing definitional approaches. Firstly, some scholars define social value around the context of their research project and the specific issues being addressed in communities (Korosec & Berman, 2006; Peredo & Chrisman, 2006). Fotheringham and Saunders (2014) for example, linked social value to poverty reduction for women; while Miller and O'Connor (2016) linked social value to the employment of women in Uganda, and improvements in their lives and family's quality of life. Stevens et al. (2015) argued the contextual approach was useful when assessing singular research projects, but became difficult at a conceptual level when assessing a heterogeneous population. Others conceptualise and define social value more generically as it is understood it can vary from one context to another (Murphy & Coombes, 2009; Zahra et al., 2009). Brickson (2007) agreed with this position, and defined social value as enhancing the wellbeing of the earth and its inhabitants; while Murphy and Coombes (2009) defined it as the improvement of the basic values which society considered important and integral. Lorenzo-Afable et al. (2020) outlined social value creation had been conceptualised as a positive change in the lives of individuals, social groups, communities and society. This reflected an improvement in the wellbeing because of access to opportunities that enabled them to become self-sufficient and autonomous (Lorenzo-Afable et al., 2020).

SE organisations address a variety of issues by selling or offering social services, programmes, and/or products that benefit individuals and the wider community (Joyce et al., 2022; Mair & Marti, 2009; Roy et al., 2021; Weaver, 2019). More specifically, producers, workers and owners, society and purchasers can benefit from SE activities (Kato et al., 2017; Srivetbodee et al., 2017; Weaver, 2018). SEs often benefit marginalised members of society who are inadequately supported by the market or their political institutions (Srivetbodee et al., 2017). Employment-focused SEs, for example, often recruit individuals from segments of the population that have experienced long-term social and economic exclusion (Aiken, 2007; Cooney, 2013; Maxwell & Rotz, 2017). It is recognised SE benefits can extend beyond certain individuals and groups, and influence society more broadly through

'systemic social change' in areas such as local economic development, public health, and poverty reduction (Srivetbodee et al., 2017). Purchasers and government institutions that procure and consume goods and services from SE organisations can also benefit from their positive social and/or environmental attributes (Srivetbodee et al., 2017).

Researchers and practitioners have applied a number of different approaches to assess the social value created by SE organisations (Gupta et al., 2020; Kato et al., 2017; Perrini & Karatas-Ozkan, 2021). Although there is a multitude of approaches available there has remained little consensus around which to use (Kato et al., 2017; Polonsky & Grau, 2008). Many SEs experience difficulties selecting the best method for carrying out the measurement process (Perrini & Karatas-Ozkan, 2021; White et al, 2022). Mulloth and Rumi (2021) argued there remained a lack of standardisation and guidance for social entrepreneurs in choosing methods that can assess their organisation's performance. Manetti (2014) outlined the debate on the evaluation of socio-economic impact generated by SEs has gone hand in hand with the growth of the sector. Maas and Liket (2011) identified over 30 approaches that have been applied to assess social value, and found they often differed in their purpose, time frame, orientation, perspective and approach (see Table 4-1). The approaches often focused on a SE's inputs, outputs, outcomes, and impacts. Inputs referred to products, projects, or processes that allowed the SE to fulfil their objectives (for example, training programmes), while outputs referred to what was produced as a result of those inputs (for example, 10 participants completed the training programmes). The outcomes often related to the benefits and changes accomplished in the short term as a result of the outputs, while the impacts referred to what the organisation had achieved as a result of the combined outcomes. McLoughlin et al. (2009) believed social value tools generally examined one or more of the following: inputs (human resources, work conditions, purchasing policy, governance model); outputs (activity productivity, product/service quality); outcomes (positive impacts on beneficiaries); and impact (long-term impacts on community). The study set out the components of an assessment diagrammatically (see Figure 4-1).

Table 4-1 Characteristics of social value measurement methods.

Material removed due to copyright compliance

Source: Adapted from (Maas & Liket, 2011).

Material removed due to copyright compliance

Source: Adapted from (McLoughlin et al., 2009).

Figure 4-1 The components involved with assessments of social enterprise interventions

A number of methods have been established to assess social value including: Social Return on Investment (SROI) (Cooney & Lynch-Cerullo, 2014; Emerson et al., 2001; Millar & Hall, 2013; Mook et al., 2015); On-going Assessment of Social Impacts (OASIS) (Clark et al., 2004; Maas & Liket, 2011); Social Accounting and Auditing (SAA) (Gibbon & Affleck, 2008); Social Impact Assessment (SIA) (Grieco et al., 2015; Mulloth and Rumi, 2021); Expanded Value Added Statement (EVAS) (Mook et al., 2007); and Economic and Social Value Added (VAES) (Bagnoli & Megali, 2011). These methodologies often concentrate on calculating a return on investment and assess financial milestones and tasks completed (Kato et al., 2017; Liston-Heyes & Liu, 2021). These tools often worked well for SEs focused on employment and health care, but were ill-equipped to capture aspects of social value creation such as the empowerment of women or improvements in political participation.

The SROI method assesses the blended economic and social value, and provides a figure on the return on investment (ROI) for SEs that are operating businesses with deeply embedded social components (Emerson, 2003; Manetti, 2014; Kah & Akenroye, 2020; Murphy et al., 2021). The SROI

approach was first developed by the Roberts Enterprise Development Fund (REDF) in a report titled 'New Social Entrepreneurs: The Success, Challenge and Lessons of Non-profit Enterprise Creation' (Emerson et al., 2001). REDF provided philanthropic capital and infrastructure for SEs that operated commercial businesses and provided employment and jobs for marginalised workers. The SROI approach incorporates principles of cost-benefit analysis (CBA) and social accountancy to produce monetary values of the social and environmental value generated by a SE (Millar & Hall, 2013).

SROI measures the value of social benefits created by a SE, in relation to the relative costs of achieving these benefits (Rotheroe & Richards, 2007). Cooney and Lynch-Cerullo (2014) set-out the calculations behind the SROI procedure (see Figure 4-2). The net value of the SE's commercial businesses was obtained by calculating their total revenue and subtracting the cost of goods sold, operating costs, working capital investment, and depreciation costs. The net value was then added to the social purpose value created. The social value was viewed as savings to the public sector by way of reduced welfare payments to clients and/or declining re-offending, and gains to society in terms of increased taxes from the new employees. These benefits were calculated in monetary terms and viewed in relation to the accompanying social costs involved with employing marginalised individuals. Social costs could refer to counselling, job coaching, or workshops offered in addition to their SE.

Source: Adapted from (Cooney & Lynch-Cerullo, 2014, pp. 371-372).

Figure 4-2 SROI equation used to assess social value created by social enterprises

SROI has been applied frequently to measure the social value created by SEs (Clifford et al., 2013; Cooney & Lynch-Cerullo, 2014; Emerson et al., 2001; Millar & Hall, 2013; Mook et al., 2015; Ryan & Lyne, 2008). Cooney and Lynch-Cerullo (2014) outlined the approach can assist SE management and decision-making processes, and can help them understand the impact of their projects or programmes. Kim and Ji (2020) outlined the approach helped to measure the social added value of SEs and reflect them in their performance. Mook et al. (2015) utilised the SROI to assess the value created by a Canadian SE called Furniture Bank. It gave second-hand furniture and household goods to people who had transitioned out of abusive situations, homelessness, or refugee camps. It also provided employment and training through its pick-up and delivery service. The SROI approach calculated for every $1.00 (CAD) of inputs, $2.09 (CAD) of social value was created (Mook et al., 2015). The SROI measurement tool has often been used to assess outcomes already achieved, or to forecast the potential social value generated by a SE. The tool has been used to help inform decisions

and provides an opportunity to show the value of a SE (Millar & Hall, 2013; Nicholls, 2017; Nicholls et al., 2009).

SROI has practical and ideological barriers that limits its application as a social value measurement tool (Luke et al., 2013; Kim and Ji, 2020; Nielson et al., 2021). Nielson et al. (2021) outlined barriers confronting those operationalising SROI included: a lack of data, time, and resources; selecting proxies; identifying causality; and assessing if impacts would have occurred regardless of SE efforts and activities. Millar and Hall (2013) examined SE organisations in the English health and social care sector that applied SROI. SEs were encouraged by the National Health System (NHS) due to their potential to deliver efficient, cost effective, and responsive services (Millar & Hall, 2013; Peattie & Morley, 2008). The NHS favoured the SROI approach and incentivised its use and implementation. The study observed the SROI approach required significant time, money, and resource input. This made it difficult to implement and practice and affected SE willingness to use it, as they saw it more as a burden than a useful tool for measuring social value. The study found only 30 per cent of organisations implemented the approach despite having received training and funding. Groups with a small resource base simply did not have the capacity to use the tool. The research findings were also consistent with other studies that identified difficulties with assigning value to subjective and soft outcomes or impacts such as increased confidence and self-esteem (Bertotti et al., 2011; Millar & Hall, 2013; Pathak & Dattani, 2014; Wongtschowski, 2015). The study proposed value measurement tools such as SROI did not fit all SEs, and suggested customised tools offered greater potential for uptake and application (Millar & Hall, 2013). Luke et al. (2013) found some SE impacts and outcomes, for example increased quality of life or community spirit, could not be meaningfully measured, or quantified in monetary terms. This risked devaluing these outcomes or changing the priorities of SE if the organisations performance is governed by returns from SROI (Luke et al., 2013).

As outlined, the SROI approach has an underlying cost-benefit analysis (CBA) component. New Zealand also has a domestic CBA tool that was initially released in 2015 through the Treasury department. The tool sought to encourage decisions within the public sector to be informed by cost-benefit analysis (New Zealand Treasury, 2020). It provides agencies and organisations with an ability to take a long-term and broad view of societal impacts, costs and benefits, and allows them to monetise impacts and return on investment (New Zealand Treasury, 2020). The tool contains a database of publicly available data that can be used to value impacts, for example, the cost of a jobseeker's support benefit and increased income for individuals.

The Social Accounting and Auditing (SAA) approach is another method that is applied to measure SE social value (Dey, 2007; Gibbon & Affleck, 2008; Kocollari & Lugli, 2020; O'Dwyer, 2005). Gibbon and Dey (2011) outlined SAA was established for small value-driven SEs in the 1990's to see if they were

achieving their objectives. It incorporated internal data collection and analysis (social accounting) and independent auditing (social auditing), that generated results which could be reported. It used narrative and qualitative measures differentiating it from the SROI that only used quantitative and reductive measures (Gibbon & Dey, 2011). Mook et al. (2007, p. 30) defined social accounting:

> *"…as a systematic analysis of the effects of an organisation on its communities of interest or stakeholders, with stakeholder input as part of the data that is analysed for the accounting statement".*

Darby and Jenkins (2006) used SAA to assess the sustainability contributions of a UK SE case-study called Wastesavers. The study developed eight indicators including: economic impact, skills and training, employment opportunities, community impact, reuse and recycle, education and awareness training, capacity building, and promoting better waste management in business. These indicators helped promote internal and external accountability and provided better insight on the impacts of their activities. The SAA has received some criticism by those who have applied the approach. O'Dwyer (2005, p. 292) exposed contradictions, tensions, and obstacles within the SAA processes, and it was concluded they were *"emasculated by management and designed to serve organisational as opposed to broad stakeholder interests".* The reality of accountability was often problematic and faced uncertainty, resistance, fear and confusion (Gibbon & Dey, 2011).

The Social Impact Assessment (SIA) approach has also been applied to measure SE social value (Florman et al., 2016; Kramer, 2005; Mulloth and Rumi, 2021; Smith & Stevens, 2010). The SIA is broadly understood as a process that assesses an organisation's impacts on groups (Grieco, 2015). Burdge (2003) viewed SIA as the analysis, observing, and management of the outcomes resulting from a social intervention. The assessment could use primary or secondary data sources to identify social impacts. Epstein and Yuthas (2017) defined SIA as the identification of the social impacts resulting from an organisation's activities. Advocates of the tool believe it has complemented traditional economic accounting which neglects non-financial goods and services and often focuses on shareholders (Grieco et al., 2015). The SIA process allows SEs to identify, measure, and gather evidence of their impact. This provides them with a greater understanding of their impact and performance which can improve resource allocation and reporting to stakeholders (Grieco, 2015).

SE interventions are complex processes that have multidimensional impacts and outcomes that defy a simplified assessment (Luke et al., 2013). Despite a variety of available approaches, there has remained a dominant focus on economic value and financial measures (Kato et al., 2017). Approaches that assign monetary values to non-monetary outcomes and/or impacts enable SE organisations to communicate the cost-effectiveness of operations to donors and stakeholders; however, they do not address the social complexity associated with the interventions (Kato et al.,

2017; Luke et al., 2013). This has meant social, political, and cultural dimensions of social value are often insufficiently assessed. In addition, the approaches often do not adequately capture beneficiaries' perspectives (Lorenzo-Afable et al., 2020).

Despite their key role as intended recipients of value in SE, literature that reflects the voices and views of beneficiaries is scarce and has mostly emerged in the context of the developed world (see Farmer et al., 2016; Munoz et al., 2015). Existing literature on social impact provides some insights into the situation of beneficiaries. However, these studies mostly advance understanding of the activities and processes used to address social issues, and therefore provide a top-down management perspective where beneficiaries are viewed as 'passive recipients of value' (Lorenzo-Afable et al., 2020). These studies have often perpetuated conceptions of SE as creations of 'hero' social entrepreneurs that seek to create social value and help meet the needs of society. Bacq et al. (2016, p. 716) clarified this position stating:

> *"…overoptimistic expectations of the impact of social entrepreneurs based on a biased or misleading moral portrait may hinder their potential ethical and moral drive to come to full fruition".*

Therefore, incorporating beneficiaries' perspectives is important to a critical discourse of SE social value creation. Social value creation should not be conceptualised as a uni-directional process in which beneficiaries are situated at the receiving end, but as an inclusive and reciprocal practise which involves the active participation of its beneficiaries. This process can help identify what is important and meaningful to them and may help to identify situations where vulnerable beneficiaries are susceptible to exploitation (Lorenzo-Afable et al., 2020). Therefore, approaches to social value creation that capture the voices of beneficiaries can offer important insights on the impact of SE organisations. Amartya Sen's CA has in recent times emerged in the SE literature, reconceptualising social value around the opportunities and/or freedoms made available to individuals to lead lives they value, and have reason to value.

The CA offers a suitable approach for assessing the social value created through SE organisations (Kato et al., 2017; Weaver, 2018; 2020). The CA can be used to ascertain the valued states of being and/or doing beneficiaries can achieve in their lives. The approach centres the focus of evaluation on SE organisation's ability to expand the capabilities of their beneficiaries i.e., what they enable people to do and be. This moves the approach beyond traditional methods of assessing social value, which as outlined earlier, have tended to focus on economic value and financial measures. The CA can used to incorporate beneficiaries' perspectives and experiences into an assessment of social value, which is crucial to understanding the impact SE organisations have on wellbeing. The following section builds on this by addressing the existing studies that apply the approach in SE literature.

4.3 Social enterprise and the capability approach

The following section reviews literature that applies the CA within the context of SE. The application of the CA has received renewed attention over the last few years. Recent publications have focused on reconceptualising social value creation around the CA (Kato et al., 2017; Weaver, 2018, 2019). These have emerged in response to calls for better understanding and measures of social value. Kato et al. (2017) argued the CA offers several qualities that makes it particularly insightful for social value measurement: the inclusion of a social context; the ability to measure based on the beneficiary's perspective, and the ability to take a holistic view of the beneficiary's life. It was suggested the CA has 'great potential' as a multidimensional approach to the measurement of social value, and more generally, the performance of projects, firms and interventions. As outlined in chapter 3, the CA has been operationalised across multiple disciplines as an evaluative framework, and used to understand peoples' wellbeing and their quality of life. The application of the approach within the context of SE builds off these strong foundations.

4.3.1 Social enterprise and the dispersal of capabilities

The first uses of the CA within SE literature focused on the links between institutions and their role in the promotion and dispersal of capabilities. These studies recognised that human capabilities could be expanded through a variety of channels (Weaver, 2019). Sen proposed in his publication 'Inequality Re-examined' that capabilities could be promoted by individuals, social groups, governments, and institutions (Sen, 1992). It was argued social interventions and evaluations should provide or consider opportunities and/or freedoms that enable people to lead lives they value and have reason to value (Sen, 1992). Similarly, Martha Nussbaum outlined in the publication 'Beyond the Social Contract: Capabilities and Global Justice' several reasons that institutions were suitable mediums for dispersing capabilities (Nussbaum, 2004). Firstly, they connected and organised people around specific causes. Schools, for example, fostered capabilities that met education needs, and hospitals fostered capabilities that meet medical needs (Weaver, 2018). Secondly, they provided for a fair context for distributing human capabilities, allowing people from all backgrounds to promote capabilities rather than just those with the means or desire to promote them. Finally, institutions allowed individuals to reconcile and balance their personal lives and moral philosophies (Nussbaum, 2004).

Within this context emerged some studies that viewed SEs as institutions that could aid in the promotion and dispersal of capabilities. Professor Margherita Scarlato from Roma Tre University in a paper titled 'Social Enterprise and Development Policy: Evidence from Italy', suggested SE should be discussed within the theoretical framework of human development and the CA (Scarlato, 2012). It was believed SEs should be evaluated using parameters such as freedom, participation, and

inclusion, as these formed the basis of human development. SEs were defined as entrepreneurial activities that were sustainable in terms of organisation and revenues for social benefits. The groups pursued the general interests of the community through the provision of advocacy and social services for the marginalised and disadvantaged. There organisations produced goods and services for the collective good and were driven by ideals and values rather than profit. Scarlato pointed out society did not often adequately demand for greater rights, participation and equity, or in short, demand for greater capabilities. It was argued public policy could serve as a catalyst when demand did not arise, due to high levels of deprivation, poverty, inequality, or lack of agency. It was suggested public policy makers should promote SE as institutional structures that could enlarge and disperse capabilities. It was argued that SE organisations contributed to development by expanding capabilities through the supply of goods and services that were targeted towards vulnerable populations.

The paper believed the key link between SE and human development was agency. Public policies were essential to development, but their effectiveness was constrained by individual's participation in the decision-making and implementation processes. The paper acknowledged Sen's original interpretation of agency and freedom was focused on the individual, but recognised it was a social construct, and that social relations influenced preferences, values and the ability of individuals to make choices (Scarlato, 2012). Scarlato argued the individualistic approach neglected collective capabilities. It was believed those from marginalised communities could only access and convert some capabilities through participation in groups, associations, or organisations that supported individual choice and action. It was suggested SEs offered a collective area which was shared by those that had capabilities and those lacking them. The organisation connected individuals who interacted daily. In doing so, SEs acted as a form of collective agency. This helped to sustain and express the actions of individuals from vulnerable social groups.

A subsequent publication by Scarlato titled, 'Social Enterprise, Capabilities and Development Paradigms: Lessons from Ecuador', examined the influence of social movements on SE within Ecuador, and more broadly in Latin America (Scarlato, 2013). The study built on the earlier publication, and again addressed the application of the CA within the context of SE. The study adopted the 'buen vivir' framework which was underpinned by a social philosophy that recognised the limits to economic growth, the importance of consuming less, and developing a sense of the collective. Buen vivir included references to quality of life, but argued wellbeing was only possible within community (most understood this to include nature) (Gudynas, 2011). It was critical of classical Western development theory and advocated alternative perspectives that leaned on indigenous traditions (Gudynas, 2011). The approach was widely affirmed across Latin America and framed Ecuador's economic development plan at that time.

The study posited again SEs contributed to development by expanding individuals' capabilities through the goods and services they delivered. It was proposed SEs generated social value through social inclusion and trust that was built through participation between vulnerable individuals and communities. It was reiterated again, SEs offered a 'collective area' shared by those with and without capabilities. The study suggested the organisations facilitated the development of collective capabilities through social interactions with others, and subsequently enhanced individual capabilities. It was reasoned SEs provided marginalised people with the freedom and opportunity to participate in groups that supported individual choices. The concept of collective capabilities helped to reconcile the individualist orientation of the CA with the principles of reciprocity and collectivity, that underpinned Ecuador's buen vivir vision (Scarlato, 2013).

These two studies were some of the earlier applications of the CA in SE literature. The research was primarily theoretical based but offered insightful reflections. It built on Sen's earlier proposition that institutions aided the promotion and dispersal of capabilities. Scarlato believed SEs could play an important role in promoting human capabilities and economic development. It was posited the organisations through their goods and services fostered collective capabilities, which directly enhanced the capabilities of individuals from marginalised communities. It was argued collective action provided solidarity and played an important role in awareness and empowerment, and allowed marginalised individuals to focus on the type of life they valued. The papers argued the CA had an individualistic focus, and Sen in particular, had not adequality addressed communal and collective aspects of wellbeing. The research reinforced the notion that personal agency occurred within society, and individuals were indelibly linked and influenced by nature and the society around them (Carballo, 2016).

Scarlato offered interesting insights, laying out SE institutions could influence persons' capabilities. In addition, it supported the idea social value could be conceptualised around the CA. The studies are limited by a lack of empirical evidence, particularly around the assumption SE organisations enhanced capabilities. Interestingly, it was assumed SEs only enhanced capabilities, and did not consider a scenario where capabilities may be restricted or lost. The studies did not look at functionings', and it was unclear if individuals were able to achieve better states of being and/or doing as a result of interactions with a SE. Further research is needed to explore and specify what or whose capabilities/functionings are affected.

4.3.2 Social enterprise social value and the capability approach

The previous section addressed studies that viewed SEs as institutions that could promote and disperse capabilities. Subsequent research has expanded the application of the CA, and focused on the reconceptualisation of SE social value. It has been argued the CA is a useful tool for examining

social value due to its multidimensional view of human development (Weaver, 2018, 2019). The CA reconceptualises the social value created by organisations around their services, activities and products that enhance persons' wellbeing through the expansion of their capabilities (Kato et al., 2017; Weaver, 2017, 2018). The following section addresses studies that have applied the CA to assess social value creation in social entrepreneurship (Choi, 2015; Choi & Majumdar, 2015; Yujuico, 2007, 2008), and social enterprise (Kato et al., 2017; Scarlato, 2013; Weaver, 2017, 2018, 2019; Wongtschowski, 2015).

The social entrepreneurship literature has recognised important synergies between social value creation and the CA. These studies were included in recognition that SEs can engage in social entrepreneurship and be led by social entrepreneurs (Brouard & Larivet, 2010); and create social value (Ryan & Lyne, 2008; Weaver, 2018). Researchers have utilised the CA to reconceptualise social value creation in the context of social entrepreneurship and social innovation. For example, Mulgan (2012) and Pol and Ville (2009) suggested the CA could be used to conceptualise social value creation in research on social entrepreneurship and social innovation; while others such as Yujuico (2008) and Ziegler (2010) applied the CA as a framework to clearly define the 'social' aspect of social entrepreneurship. Yujuico (2008) proposed the CA was a unifying theoretical framework that could be used to comprehend social entrepreneurship. It was argued social entrepreneurship was about enhancing the ten central human capabilities (as set out by Nussbaum), while social entrepreneurs were motivated by improving these capabilities by creatively bringing together social, physical, human, financial and natural capital. Ziegler (2010, p. 265) hypothesised that "social innovation is the carrying out of new combinations of capabilities". The study did not specify which capabilities were made accessible by social entrepreneurs, but agreed they sought to expand the capabilities of others so they could lead lives they valued and had reason to value (Ziegler, 2010). Thus, Ziegler was conceptualising social innovations as capability innovations (Choi & Majumdar, 2015).

The lack of a universal definition or measurement tool for social value prompted the application of the CA within SE literature (Kato et al., 2017; Weaver, 2018; Wongtschowski, 2015). It was reasoned human needs were multi-dimensional, and that traditional approaches to SE social value had often been unidimensional and failed to recognise the diverse ways these institutions advanced human development. Traditional methods such as SROI, SAA, and SIA were limited in their ability to capture the impact on people's wellbeing (Ebrahim & Rangan, 2014). As outlined in chapter 3, the CA offered a mutli-dimensional framework that has been used to evaluate poverty, inequality, wellbeing, and quality of life. The CA is a value-based tool that more broadly assesses the impact of programmes, institutions, and projects as it incorporates social context, beneficiary's perspectives, and views beneficiary's lives more holistically (Kato et al., 2017).

Researchers have applied the CA to assess the goods and services offered by SEs. It is reasoned these goods and services impact human development, and can expand the opportunities and/or freedoms available to people (Weaver, 2019). Cornelius and Wallace (2013) suggested using CA to assess the extent they enable community members to exercise choice to participate in society and the mainstream economy. It was argued the approach could help to reconcile some of the tensions between rhetoric and reality of SE activity and their value in regenerating communities. It was believed the CA could provide greater clarity regarding city regeneration, wellbeing, and quality of life. The study proposed future research should consider assessing the genuine impact SEs have on communities, wellbeing and quality of life. This would help communicate their social engagement and social value (Cornelius & Wallace, 2013).

The CA has been to reconceptualise the social value generated by SE organisations. Weaver (2019) examined the application of the CA within the context of SEs based in the United States. SEs were defined as a social intervention that operates under any legal form and uses commercial business activities to advance human development. The study presented a new Social Capability Intervention Model that consisted of five major components: 1) strategy for positive social change; 2) types of social capabilities; the social activities that SE engage in to advance social capabilities; 4) its target beneficiaries; and 5) the number of beneficiaries served (Weaver, 2019). It was posited SEs were institutions that address social problems and seek to create positive change in the lives of their beneficiaries. The study developed a theory of positive social change (see Table 4-2). This showed SEs offer goods, programmes, and/or services that fulfil human needs. It was argued SEs had strategies for creating positive social change and engaged in specific activities to carry out the strategy.

Table 4-2 Theory of positive social change: How social enterprises seek to address human needs.

Source: Adapted from (Weaver, 2019).

The study argued the term social value needed to be replaced with the terms 'social capabilities' and 'social functionings'. Social capabilities referred to the opportunities created through a SE services and activities that advanced human wellbeing, while 'social functionings' referred to the actual impact a SE services and products had on beneficiaries (Weaver, 2019). It was speculated that SE goods and services could produce opportunities that addressed human needs. It was believed the organisations created social value through the provision of opportunities that addressed issues such as unemployment, welfare dependency, and criminal reoffending. The study introduced a list of 13 central social capabilities: general health, mental/emotional health, safety/abuse, education, life-planning, property ownership, employment training, social organisation and inclusion, discrimination issues, interaction with nature, political participation, creative expression, and recreation (Weaver, 2019). The was closely modelled off Martha Nussbaum's central list of capabilities, and reflected areas of wellbeing that may be affected by the services, goods, and programmes created by SE organisations.

Weaver's study developed the 'Social Capability Measure' (SCM) to assess the social capabilities created by SE organisations. The tool assessed four components: the types of services offered, the actual services offered, target beneficiaries, and the total number of beneficiaries served annually. In total, the study surveyed 115 SEs and examined their social, economic and legal pursuits. The study collected data from participants who held executive leadership positions. It was found each organisation created three social capabilities on average, while the most commonly identified related to education, employment training, health, life-planning, and interaction with nature. It was found that greater revenue correlated with a more diverse range of social capabilities, while legal structure affected their creation (Weaver, 2019). The SCM provided some insight into the types of capabilities (opportunities and/or freedoms) that SE could offer beneficiaries. The study revealed SEs could create a range of social capabilities (that is more than one), and showed the CA could be used to identify the multi-dimensional impacts of the organisations.

The research provided valuable insight on the application of the CA, but was accompanied with some limitations. The survey instrument implemented assessed only executives/management and did not extend to employees or beneficiaries of the SE goods and services. This meant it is unknown if the social capabilities actually impacted beneficiary's wellbeing, or if these impacts were equally distributed across individuals and groups. Some individuals may have experienced enhanced capabilities as a result of the SE intervention, but could have declined to act on these. The SCM provides limited insight into how peoples' lives are impacted through interactions with a SE organisation. Nevertheless, the study shows SE are institutions that may enhance peoples' wellbeing.

The reconceptualisation of social value around the CA has continued to receive attention (Kato et al., 2017; Tanekenov et al., 2018; Weaver, 2018). Tanekenov et al. (2018) operationalised the CA to assess and measure the social value created by SEs that provided employment opportunities for homeless people. The study conceptualised social value around the CA and focused on the 'empowerment' of beneficiaries. It argued "empowerment was a key objective of policies that aimed to improve the lives of homeless people and other vulnerable groups", and believed the CA was an appropriate method for operationalising the concept (Tanekenov et al., 2018). The study explored whether providers and users of SEs considered them effective vehicles for empowerment across four capability domains: bodily domain, political and economic domain, creative domain, intellectual and self-development domain (see Table 4-3).

Table 4-3 Domains of the capabilities-grounded empowerment framework.

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Source: (Tanekenov et al., 2018).

The study interviewed 15 staff and 23 employees at four SEs, and applied a capabilities-grounded empowerment framework. The research findings produced mixed results. It found some participant's physical and mental health improved. It observed participation in the SE programmes provided little opportunity to improve accommodation and living circumstances. In the economic domain participants' work skills were enhanced, however, there was little evidence that SEs had helped transition people into mainstream employment. The study cautioned against assuming all SEs empowered disadvantaged groups, and suggested they could be limited in their ability to enhance capabilities across all domains (Tanekenov et al., 2018).

> *"The evidence presented above does however caution against any automatic presumption regarding the "empowering" benefits of SEs for disadvantaged groups, and gives pause to the enthusiasm with which*

specialist SEs are often embraced across the political spectrum" (Tanekenov et al., 2018, p. 152).

It proposed a broad multi-dimensional approach was needed to enhance the capabilities of homeless people with complex needs, rather than a reliance on employment-focused SEs.

The research provided some useful insight on the social value created by SEs. It supported the application of the CA, and argued it provided an appropriate means of operationalising the concept of 'empowerment'. The study was accompanied with some limitations. Firstly, it lacked a comparatory or counterfactual group that would have aided assessing the impact on the beneficiaries. This made it difficult to make claims on causal relationships. The study did not assess beneficiaries' lives prior to joining the SE, and was therefore reliant on participants accurately recalling impact on empowerment. The cross-sectional nature of the study also meant it was unclear if individuals moved into mainstream employment.

4.4 Conclusion

This chapter addressed the relationships between SE, social value creation, and the capabilities approach. SEs are broadly defined as organisations that pursue a core social and/or environment mission; and whose majority of income is derived from commercial revenue gathering ventures, which is used to support the fulfilment of their core social purpose and mission. It has been suggested SEs can make valued contributions to a wellbeing economy and can help address societal issues (Roy et al., 2021; Weaver, 2022). As hybrid organisations they have been found to create social and economic value. This chapter observed there is considerable uncertainty around the definition of social value, while there are a multitude of approaches to its measurement (Maas & Liket, 2011). These typically focus on generating a monetary value for both financial and non-financial impacts/outcomes, but often struggle to capture more nuanced and intangible effects and incorporate beneficiaries' perspectives.

This chapter outlined the importance of incorporating beneficiaries' perspectives when assessing the social value created by SE organisations. It suggests the CA offers a suitable approach as it centres the focus of evaluation on the organisation's ability to expand the capabilities of their beneficiaries i.e., what they enable people to do and be. The chapter has shown the CA has been applied to both conceptualise and measure social value. The approach does not neatly resolve all limitations associated with current impact measurement approaches, but incorporates social context, beneficiary's perspectives, and views beneficiary's life more holistically (Kato et al., 2017). The CA offers a set of principles for social value and places emphasis on the opportunities and freedoms available to people to lead lives they value, and have reason to value.

This chapter also addressed the application of the CA within SE literature. Early research suggested SEs are institutions that can disperse capabilities. More recent publications reconceptualise their social value around the CA, and argue SEs can produce opportunities that enhance the capabilities of their beneficiaries (Kato et al., 2017; Tanekenov et al., 2018; Weaver, 2018, 2019). Those studies have generally been conceptual and theoretically focused, and few empirical studies exist to support these claims. This chapter identified several gaps within the existing research landscape. Firstly, it remains unclear what impact SE has on peoples' wellbeing, specifically changes across their capabilities and/or achieved functionings. It is uncertain if some areas of wellbeing are affected more than others. Secondly, it is uncertain if the impacts are consistent for all individuals and groups. This thesis seeks to contribute new knowledge around these areas. The following chapter will address the methodological procedures used to guide this study and the development of its research instruments.

Chapter 5

Research Methodology

5.1 Introduction

This chapter addresses the research methodology implemented in this thesis. The previous chapters have shown SEs are hybrid organisations that create social and economic value through the provision of their goods and/or services. Existing literature has suggested that SEs may enhance the capabilities and/or functionings of their beneficiaries; however, there is few empirical studies and evidence to support these claims (Munoz et al., 2015). As explained in chapter 1, the aim of this study is to examine the impact SE organisations have on the wellbeing of people. This aim is achieved by answering four research questions, listed below again for convenience.

RQ1. How does individual's capabilities and/or achieved functionings compare before and after they join a social enterprise organisation?

RQ2. How does the capabilities and/or achieved functionings of those that interact with a social enterprise compare with other population groups in New Zealand?

RQ3. What are the explanatory factors behind individuals' subjective wellbeing prior to their involvement with a social enterprise organisation?

RQ4. Do social enterprise organisations impact the factors behind an individual's subjective wellbeing, and if so, does this affect the changes individual's report in their subjective wellbeing?

This chapter explains the research methods used to assess these questions and is structured as follows. It initially explains how the SE organisations in the research were selected. The chapter then addresses the impact evaluation approach and the considerations for a comparatory or counterfactual group. This is followed with an explanation of the data collection tool. It identifies the preliminary considerations that informed and guided the thinking behind the collection of data. The chapter then addresses the design of the data collection instrument used to assess wellbeing. This is followed with an outline of the selection of the sample group, and the analysis procedures used to assess the data. The chapter then finishes with some concluding remarks.

5.2 Research positioning

The following section will address the positioning of the researcher. Positionality is a term used to describe an individual's world view and the position adopted about research and its social and

political context (Holmes, 2020). Gray (2018) outlined the philosophical stance of a researcher strongly influences the reasoning of the research, and can impact both the data required by the research and the analysis of the data. Research philosophy consists of ontological and epistemological considerations. Ontology refers to the claims and assumptions that are made about the nature of reality, claims about what exists, what it looks like, what units make it up, and how these units interact with each other (Grey, 2018). Objectivism and constructivism are two commonly held ontological positions. Objectivists believe there is one objective reality experienced the same way by each one of us, while constructivists believe reality is constructed by everyone differently. Epistemology looks at the possible ways of gaining knowledge. Positivism and interpretivism are two commonly held epistemological positions. Positivism advocates the application of quantitative methods of natural science to the study of reality i.e., reality can be modelled. Interpretivism separates the objects of natural science from the actors, and argues individuals constrict their own truth when viewing the world i.e., reality can be interpreted.

This research adopted a pragmatic research philosophy. Pragmatism is a rich philosophical position and has a distinct approach to truth, method and meaning (Frankel, 2016). Early works emerged from classical pragmatists including Charles Sanders Peirce, William James, and John Dewey. As a research paradigm, pragmatism is based on the proposition that researchers should use a philosophical and methodological approach that works best for the research problem being investigated (Kaushik and Walsh, 2019). Pragmatism as a research paradigm refuses to get involved in the metaphysical concepts of truth and reality. It rejects the traditional philosophical dualism of objectivism and interpretivism that were outlined in the previous paragraph. Instead, accepting there can be a single or multiple realities that are open to empirical inquiry. It is posited objective reality exists apart from human experience; however, this reality is grounded in the environment and can only be encountered through human experience (Kaushik and Walsh, 2019). The pragmatic research position is orientated towards solving practical problems in the real world and advocates for the adoption of a methodology best suited to meet research objectives. Pragmatism allows the possibility of choosing appropriate research methods from a wide range of qualitative and quantitative methods, and this a strength that has advantages for SE research. It sets an inclusive framework of inquiry that supports interdisciplinary and cooperative research (Koenig et al., 2019). Therefore, pragmatism brings together different perspectives, and has the potential to closely engage and empower marginalised communities (Kaushik and Walsh, 2019). This aligned closely with the positioning of the researcher.

A researcher's positioning is also influenced by their values and beliefs which are shaped by factors including: political allegiance, religious faith, gender, sexuality, political allegiance, ethnicity, social status, and (dis)abilities (Holmes, 2020). It recognises the life history, personal biography, and

personal, political, and professional interests greatly influence research decisions and data collection processes (Feld et al., 2021). Berger (2015, p. 229) addressed this stating:

> *"Because no research is free of the biases, assumptions, and personality of the researcher and we cannot separate self from those activities in which we are intimately involved (Sword, 1999: 277), strategies for attending to the effects of the researcher's characteristics have been developed".*

Therefore, self-reflection and reflexivity are required for the researcher to identify, construct, critique and articulate their positionality. Cohen et al (2011) outlined reflexivity is a concept researchers should acknowledge and disclose, seeking to understand their part in it, or influence on it.

This research applied strategic reflexivity to critically reflect on their positioning in relation to the research aims, methods, and approach. I am a fourth generation New Zealand-European (Pākehā) and a descendent of immigrants from the United Kingdom, Denmark, and Australia. New Zealand citizenship, middle class socio-economic status and educational opportunities have afforded me considerable privilege. It is recognised the injustices and inequities associated with colonisation, exploitation and racism should be acknowledged and the researcher's position of considerable privilege in the research relationship. I have engaged in local community development for years which inspired the undertaking of this research. These experiences revealed the importance and power of businesses that pursue both a core social mission and commercial revenue gathering activities. I have also worked alongside individuals from marginalised communities for several years and developed an understanding of some the challenges confronting them. As the relationships have deepened, I have developed a greater appreciation for their invaluable contributions to their communities.

It was understood this positioning of the researcher could affect the study in several ways (Holmes, 2020). Firstly, it was recognised experiences could affect access to the 'field' because participants might be more willing to share experiences with someone perceived to be sympathetic to their situation (Berger, 2015). Secondly, it was understood the positioning shaped the nature of the researcher-researched relationship, which could also affect the participants willingness to share. Thirdly, the positioning could affect the researcher's construction of the research aims, methods, questions and lens used to filter and make meaning of the data collected from participants, which could influence the findings and conclusions drawn from the study (Berger, 2015). Therefore, the reflexive thinking process helped the researcher to identify and minimise potential biases and maintain the quality and validity of the research.

5.3 Selection of social enterprise organisations

The selection of SEs was considered during the early stages of the study. As discussed in chapter 2, SEs are defined as organisations that pursue a core social and/or environment mission; and whose majority of income is derived from commercial revenue gathering ventures, which is used to support the fulfilment of their core social purpose and mission. The first selection criteria established the organisations selected in the study fit within the broad definition of a SE and exhibited their defining characteristics (see Table 5-1). Prior to selecting a SE, a discussion was undertaken with a member of the senior management team to establish if their organisation exhibited the characteristics. During the initial selection process fifteen organisations were approached. Interestingly, a number of groups were unclear around the financial aspects of their organisation which presented challenges ascertaining if they were a SE. In some cases, it was clear they were reliant on donors and grants and could not be considered financially sustainable and self-sufficient. As outlined in chapter 2, these organisations were considered non-for-profits that engaged in commercial activities (refer to Figure 2-2).

The second selection criteria established the type of SE organisations that would be included in the research. New Zealand SEs pursue a wide variety of social and environmental missions. This thesis concentrated on employment-focused SE organisations, for several reasons. The groups had clearly defined social missions providing job opportunities to individuals from marginalised communities. The organisations had employees that could be assessed for impact on wellbeing. These individuals could be accessed relatively easily during the data collection process. In addition, the organisations employed a large number of people which provided a reasonably sized population of interest. During the selection process several SEs were not considered as their employees did not have sufficient time to take part. In total, five organisations were identified as SEs and selected to take part in the research. These groups were available to take part in the study and employed individuals from marginalised communities. The chosen SEs employed people with disabilities, Māori & Pasifika, those with prior criminal convictions, and at-risk youth. These contributed to the sample group of individuals working for employment-focused SEs in New Zealand.

The selected SEs were considered representative of employment-focused SEs in New Zealand. During the selection procedure it was observed that organisations more often employed disabled individuals. This could reflect that these SEs were able to utilise the minimum wage exception scheme which helped them maintain their financial position and enabled them to deliver their goods and services. This scheme was not available to other SEs that employed non-disabled individuals. These organisations were generally smaller and employed fewer people, which could reflect difficulties scaling and maintaining financial sustainability and commercial operations in competitive

markets. During the selection procedure two organisations that employed non-disabled individuals indicated they could no longer take part in the study. It was later found these organisations had ceased operations due to financial difficulties. In addition, a SE that was selected downsized due to difficulties with their commercial revenue-gathering activities. Existing literature points out the financial challenges SE organisations confront when balancing dual-bottom lines.

> *"For a social enterprise, the aim is to benefit a specific group of people, permanently transforming their lives, having in mind that the endeavour must also be financially sustainable. The economic environment forces social enterprises to face the ongoing challenge of sustainability. This challenge requires social enterprises to identify a business model which generates a balance between acquiring resources to build and maintain competitive advantage and using resources to engage with their key stakeholder group" (Staicu, 2018).*

Overall, the five SEs were representative of employment-focused SEs in New Zealand at that time. However, this study did reveal some of the difficulties associated with engaging in research across the SE sector. The process of SE selection was non-linear, complex, messy, unpredictable, and required some flexibility from the researcher.

Table 5-1 Characteristics used to identify relevant New Zealand social enterprise organisations.

Characteristics[1]	Description
Core social mission/purpose	The organisation has a core social mission/purpose that is clearly exhibited and set out in governing documents, for example, employs individuals from marginalised communities.
Operates in a commercial market	The organisation applies business models, skills, and tools to develop goods and services that are traded in a commercial marketplace.
Reinvestment of profits	Profits generated by the SE are reinvested to advance the social mission.
Financially sustainable	Organisation is not dependent on external grants and donations to be financially sustainable.
Accountable	The organisation is transparent and accountable to members and the wider community.
Democratic structures	Employees have some role in the decision making and/or governance of the organisation.

Source: Adapted from a variety of sources.
[1]Characteristics draw on those outlined in Chapter 2.

5.4 Establishing the impact of employment in a social enterprise

This research sought to assess what impact employment-focused SE organisations have on the wellbeing of people. One of the methodological challenges is determining what would have happened to the beneficiaries of the programme if it had not existed (Khandker et al., 2009). It is ideal to compare the outcomes of those individuals or groups that have benefited from a policy or programme (the treatment group), with a group of similar individuals (the comparison/control group), that have not been exposed to the policy or involved with the programme. A broad range of impact evaluation methods are available and can be broadly placed into three groups including: experimental designs, quasi-experimental designs, and non-experimental designs (Rogers et al., 2015). These approaches establish different ways of making comparisons between the treatment and control groups. These will be described briefly in the following paragraph.

The experimental design methods use randomisation to allocate participants into treatment and comparison groups. On the other hand, quasi-experimental designs can be used to construct a valid comparison group using statistical methods to control for different treatment and non-treatment groups. The difference-in-differences (DID) approach compares the change in outcomes experienced by the treatment group with the changes in outcomes experienced by the comparison group. This approach relies on having a comparison group whose development in key outcomes of interest we can reasonably assume would be the same as the development of the treatment group over the duration of the intervention. Propensity score matching (PSM) can also be used and involves individuals in the treatment group being matched with non-participants who have similar observable characteristics. The average difference in outcomes between matched individuals provides an estimate of the impact. Regression discontinuity design (RDD) involves ranking individuals based on specific and measurable criteria. A cut-off point is established to determine who is eligible to participate. Impact is measured by comparing outcomes of participants and non-participants close to the cut-off line. Finally, the non-experimental designs are often used when randomisation is not possible or the conditions for quasi-experimental evaluation do not hold, for example, a suitable comparatory group cannot be identified or accessed. In these cases, before and after assessments can be used. These non-experimental designs seek to construct hypothetical counterfactuals or use other strategies to test causal relationships. The approaches examine evidence to see if it is consistent with what would be expected, or if other factors could offer an alternative explanation (Rogers et al., 2015).

It would have been ideal to compare the impact of SE employment interventions with a counterfactual or comparatory group. In the context of this research this meant finding a similar group of individuals not employed with a SE. This would help establish whether the impacts on

people could be attributed to the organisation. It was difficult to find suitable counterfactual groups, and a variety of avenues were pursued. Firstly, residential community groups that provided accommodation and services for individuals with disabilities were considered. However, these community groups often had individuals that were unable to participate due to the severity of disabilities. Prison employment schemes were also considered. These provided opportunities for individuals to participate in a work environment that closely mirrored mainstream industry workplaces. Getting access to these schemes was difficult and time intensive. Finally, few commercial businesses were found that employed individuals from similar backgrounds. The diverse groups of people employed at the SEs organisations made it difficult to establish a suitable comparatory or counterfactual group. These difficulties prompted the use of a non-experimental design approach.

A before-and-after assessment approach was selected to assess the wellbeing of individuals currently employed with a SE organisation. This approach could be implemented before, during, or after a programme (Rogers et al., 2015). The non-experimental approach facilitated the comparison of individuals wellbeing before and during their employment with a SE. It provided some insight into any changes they experienced. It was recognised the absence of a counterfactual group affected inferential power, and made it difficult to establish if observed changes in wellbeing could be attributed to the SE organisations. To address the lack of a counterfactual group and improve inferential power around causal relationships, four additional components were added to the assessment. Firstly, the data collected would be compared with relevant secondary data on other population groups in New Zealand. This would allow some comparatory analysis to be undertaken. Secondly, the data collected would be supported with existing studies that had examined the impacts and outcomes of SEs. In addition, the broader literature would also be used to support any inferences or causal relationships. Thirdly, alternative explanations for any results would be explored to ensure other factors behind changes were also considered. Finally, the data would be supported with comparative analysis of qualitative data, which provided an additional approach for assessing any observed changes in wellbeing.

5.5 Data collection

The following section will address the selection and design of the data collection method used to assess the wellbeing of current SE employees. Empirical studies that operationalise the CA are confronted with important decisions. These include the selection of evaluative spaces such as conversion factors, capabilities and functionings. These spaces offer different insights into the wellbeing of people. Researchers must also consider if their study will be quantitatively or qualitatively focused. This require decisions to be made on objective and/or subjective wellbeing dimensions and indicators, and the units of analysis that will be assessed, for example individuals and

households. These decisions are often driven by the availability of existing data. This section will address this and lay-out how this study operationalised the CA to collect data.

5.5.1 Data collection tools avaliable for assessing wellbeing

A range of data collection tools were considered to assess the wellbeing of SE employees. Empirical studies that operationalise the CA use primary and/or secondary data analyses. Secondary analysis refers to the utilisation of an existing dataset that may have been collected for other purposes, while primary analysis refers to the generation of a new data set. There approaches often overlap and can be used in combination. Primary analysis is typically conducted using interviews, focus groups, ad-hoc surveys, and ethnography, and can collect qualitative and/or quantitative data. Secondary data analysis uses existing data to address research questions and objectives. The following paragraphs will briefly address each of the tools that have just been outlined.

Interviews and focus groups offer flexible approaches for assessing wellbeing. They enable an assessment under real-world conditions and provide opportunities for participants perspectives and context to be explored. The approaches facilitate the collection of both qualitative and quantitative data and can be suitable for identifying complex issues people face. These issues are not often captured by other approaches such as the analysis of existing secondary sources of data. Interviews and focus groups are advantageous as they enable participants to express their perspectives, values, achieved states of being and/or doing, and identify the opportunities and freedoms available to them. The tools are often expensive, resource and time intensive, and require a high level of expertise to carry out.

Surveys are another data collection method used in capability research. These are often designed ad-hoc for specific research projects. They are advantageous as they can be used to collect a large sample size in a short period of time. Participants may also feel more inclined to express their opinion as their identity is preserved through anonymity. Surveys need to be well designed or risk participants misinterpreting questions. In addition, individuals can skip questions or exit online surveys without completing. The approach is often less time and resource intensive than interviews and focus groups. Surveys are not always suitable for exploring individual's experiences and generally do not allow for follow-up questions.

The analysis of secondary data sources is another commonly used data collection method within capability literature. Empirical studies that utilise secondary data often focus on achieved functionings (Chiappero-Martinetti & Roche, 2009). Capabilities are not easily observed or measured, and can generally can only be inferred from the secondary data. Studies that rely on existing data sources are advantageous as they make use of large-scale random sample

surveys, enable temporal comparisons, and make the most of data that is ready to use and freely available. Despite these advantages the data has often been collected in another context, raising questions around its suitability for capturing relevant information. The data is also prone to being old and out of date, varies in quality, and can suffer from collection biases.

5.5.2 Structured interviews

After considering the above strengths and weaknesses, structured interviews were selected as the primary method to collect data on people's wellbeing. The population of interest was identified as those working at employment-focused SE organisations. Specifically, those that were the target of the group's core social mission. As many individuals working for employment-focused SEs had received little education, a participatory data collection method was considered appropriate. Conversations with senior management of the SEs confirmed that a participatory approach was necessary as it allowed questions or wording to be clarified with individuals. It was reasoned some would likely have found it too difficult to complete an online survey or questionnaire by themselves. In addition, conversations with SEs revealed that focus groups were not suitable as they presented significant disruptions to their day-to-day commercial operations. Surveys were also not utilised as many individuals may have been unable to complete the questionnaire without assistance. It was recognised that interviews were time consuming and costly to carry out; however, were necessary within the context of this study in order to collect data on individuals' wellbeing.

The availability of data was a contributing factor behind the selection of the structured interview tool. As outlined in section 5.3, difficulties finding a counterfactual and comparatory group necessitated the use of secondary data. Including questions in the interviews that matched questions in the secondary data sources made it possible to compare SE employees' wellbeing with other populations groups in New Zealand. Capability literature often utilises secondary data to assess wellbeing (Chiappero-Martinetti & Roche, 2009). The data type within these secondary data sources generally meant the studies focus on functionings (achieved states of being and/or doing) and infer capabilities where possible (Kato et al., 2017; Robeyns, 2006). A range of surveys conducted through Statistics New Zealand were initially considered. These surveys included the general social survey (GSS), household economic survey, household labour force survey, and the health survey. These survey's offered insight into different population groups in New Zealand. The GSS was selected as it contained a wide variety of relevant data that covered economic, social, political, cultural and environmental wellbeing domains. In addition, it was regularly updated (biannually) and could be accessed through Statistics New Zealand.

Statistics New Zealand provided confidentialised unit record files (CURFs) that contained the microdata (individualised responses) from the previous surveys they had conducted. CURFS were

obtained for the 2008-2012 GSS. In addition, customised data tables were also obtained for the 2018 GSS survey, which was sourced with help of the Council of New Zealand University Librarians (CONZUL). These tables contained aggregated data rather than unaggregated micro data. The 2018 survey provided better insight into the current wellbeing of the New Zealand population. In total, seven tables were requested and were cut across socio-economic and socio-demographic variables including gender, disability status, ethnicity, labour force status, and income. As mentioned, the use of secondary data provided some comparatory groups for this research. To facilitate the comparison between the groups required using the indicators and survey questions from the GSS. This influenced the type of data that could collected and the areas of the CA and wellbeing that could be assessed.

The use of structured interviews enabled the collection of quantitative and qualitative data. The interviews focused primarily on collecting quantitative data; however, also gathered qualitative data to provide insights into beneficiary's personal experiences and perspectives. The structured interviews utilised pre-determined questionnaires and standardised questions that were posed to all SE employees. These responses were recorded on a standardised schedule. The structured nature of the interview facilitated quick multidimensional assessments of wellbeing and allowed interpersonal comparisons. As outlined earlier, the participatory approach to data collection was required to ensure all employees could take part in the study. It also provided opportunities to build rapport and connection with employees. This was viewed as important for facilitating an open and honest interview process between the researcher and participants (Gray, 2018). The direct contact with SE organisations also likely improved the response rates compared with alternative online or postal survey questionnaires.

It was recognised there remained a risk of interviewer bias emerging despite the use of a standardised questionnaire. The participatory data collection method allowed those with lower literacy abilities to take part in the interviews; however, the additional guidance and clarifications also introduced the potential for biases. Gray (2018) outlined interview biases could occur in different ways, namely: 1) departure from the interviewing instructions; 2) poor maintenance of rapport with the respondents; 3) altering factual questions; 3) rephrasing of attitude questions; 4) careless prompting; 5) biased probes; 6) asking questions out of sequence; 7) biased recording or verbatim answers. It was recommended researchers ask questions exactly as written, accept participants refusal to answer questions without any sign of irritation, and to probe in a non-confrontational or directive manner (Gray, 2018). Following these steps were important for ensuring potential interview biases were minimised in this research.

The structured nature of the interviews limited the ability of the researcher to explore SE employees' wellbeing more deeply. It was recognised that semi-structured and unstructured interviews formats

offered more opportunities to examine the experiences of SE beneficiaries more closely. This was partially addressed using opened ended questions that provided employees with opportunities to elaborate on experiences with their respective SE organisations, which will be addressed in more depth later in the chapter (see section 5.6.3).

5.5.3 Selection of functionings

The use of secondary data sources influenced the evaluative spaces that were assessed in this research. The primary evaluative spaces in the CA are individuals' capabilities (opportunities and/or freedoms) and functionings (achieved states of being and/or doing). The surveys available from Statistics New Zealand examined individuals' achieved states of being and doing. However, these surveys were not designed to capture people's capabilities. It was recognised capabilities-based data was desirable but faced significant operational hurdles as they were not easily observed or measured. Sen himself acknowledged the difficulties and called for a flexible and pragmatic approach:

> *"(…) the capability set is not directly observable and has to be constricted on the basis of presumptions (…). Thus, in practice, one might have to settle often enough for relating wellbeing to the achieved-and observed-functionings, rather trying to bring in the capability set (Sen, 1992, p. 52 as cited in Dang, 2014).*

In the context of this research, achieved functionings were selected for the assessment of SE employee's wellbeing.

The selection of relevant functionings that would be assessed in the structured interviews was then considered. The decision-making process behind the selection of relevant capabilities and/or functionings has received considerable attention from capability scholars. As outlined in chapter 3, there has been some disagreement between Sen and Nussbaum concerning the selection of capabilities. Sen advocated a procedural approach and refused to endorse a list to avoid paternalism, and argued individuals and communities should make those decisions themselves (Robeyns & Byskov, 2020). Nussbaum advocated a more philosophical approach where a universal list of capabilities was endorsed. Robeyns and Byskov (2020) provided a systematic and comprehensive update on the methods available for the selection of relevant capabilities and functionings. In total, 14 methods were identified that could broadly be placed into four main categories (see Table 5-2). The study stressed the methods were imperfect and had drawbacks, for example, ad hoc methods often lacked robust justification of the particular items; foundational methods lacked democratic and

epistemological legitimacy; purely procedural methods were vulnerable to subjectivism. It was pointed out the approach selected was dependent on the context of the research.

Table 5-2 Approaches to the selection of relevant capabilities and/or functionings.

Source: Adapted from (Robeyns & Byskov, 2020).

The selection of relevant functionings in this research followed an ad-hoc approach (refer to Table 5-2). The selection was guided initially using the OECD 'How's Life' Wellbeing Framework and New Zealand's Living Standards Framework which provided some consensus and legitimacy regarding wellbeing domains that represented important areas of an individual's life. The OECD Wellbeing Framework was multidimensional and consisted of 11 domains of wellbeing that were assessed using a variety of subjective and objective measures (refer to Appendix B for a full description). The framework influenced New Zealand's Living Standards Framework (LSF). As outlined in chapter 3, the framework was developed to provide Treasury with a tool that provided insight into the impact policy had across different dimensions of wellbeing. The LSF framework extended across 12 domains of wellbeing and included a cultural identity wellbeing domain (New Zealand Treasury, 2018a). In total, eight wellbeing domains were identified as suitable in an assessment of SE employee's wellbeing. These wellbeing domains were assigned a corresponding functioning, for example, subjective wellbeing was assigned the functioning 'being satisfied with life' (see Table 5-3). This procedure has often been applied within capability literature (Comim, 2001). Chiappero-Martinetti and Venkatapuram (2014) outlined within a research context, relevant domains or variables were often considered proxies for the key elements of the CA, that is functionings, capabilities and conversion factors. The list of functioning in this research reflects peoples' achievements and their state of existence.

Table 5-3 Wellbeing domains and their corresponding achieved functionings.

Wellbeing Domain	Description of Domain	Corresponding Functioning
Civic engagement and governance	People's engagement in the community and governance of their country	Being able to trust and participate freely in political/civic life
Cultural identity	Having a strong sense of identity, belonging and ability to be oneself, and the existence value of cultural taonga	Being able to express identity
Health	People's physical and mental health	Being in good health
Housing	The quality of the housing inhabited	Being well sheltered
Jobs and earnings	The sufficiency of employment and income to meet daily needs	Being able to earn sufficient income
Knowledge and skills	Education and skills attained	Being educated
Social connections	The social support, connection with others, sense of belonging, and being able to call on people in times of need	Being social connected
Subjective wellbeing	Overall life satisfaction, sense of meaning and self	Being satisfied with life

Source: Adapted from (New Zealand Treasury, 2018b).

The time use, income and consumption, safety and security, and environment wellbeing domains were not included within the scope of the research (see Table 5-4). The excluded domains contained few suitable measures at the level of an individual. Their exclusion also enabled the interviews to maintain greater focus. It was recognised it was not feasible to assess all domains of wellbeing due to time constraints when interviewing SE employees.

Table 5-4 Wellbeing domains not included in the structured interviews.

Wellbeing domain	Description of domain
Time use	The quality and quantity of people's leisure and recreation time.
Income and consumption	The quality of people's jobs and work's environment, peoples ease and inclusiveness of finding suitable employment, job stability and freedom from unemployment.
Safety and security	People's safety from crime, abuse and violence, both physical and mental.
Environment	The natural and physical environment and how its impact people today.

Source: Adapted from (New Zealand Treasury, 2018b).

A set of indicators/variables were then selected to assess these domains and their corresponding functionings. The selection was initially guided using New Zealand's Living Standards Framework (LSF) which contained indicators/variables that assessed the wellbeing domains. These were derived from the GSS surveys conducted by Statistics New Zealand. The surveys were examined closely for suitable questions and indicators that could provide insight on SE employees' wellbeing and achieved

functionings. A broad list of indicators was initially collated. The list was examined and refined to produce a pragmatic list of 17 wellbeing indicators (see Table 5-5). This final list allowed a broad overview of employee wellbeing to be obtained, and importantly facilitated the comparison of the sample group with other population groups in New Zealand.

Table 5-5 Wellbeing indicators and survey questions used in the structured interviews.

Wellbeing Domain	Indicator(s)	Survey Question
Civic engagement and governance	General election voting	Did you vote in the last general election?
	Trust in people	How much do you trust most people in New Zealand?
Health	Self-rated health status	How would you rate your current general health?
	Smoking	Do you currently smoke?
Housing	Housing quality	Describe the condition of your current house/flat?
	Housing too cold	Does your house/flat have a problem with mould/dampness?
	Housing too damp	In winter, is your house/flat colder than you would have liked?
Jobs and Earnings	Income sufficiency	How well does your total income meets your everyday needs?
	Annual income	What is your current level of income?
Education	Highest level of education	What is the highest level of education you currently hold?
Social Connections	Help in a crisis	Is there anyone who could help you in a time of crisis?
	Contact with family	How often do you have face-to-face contact with your family?
	Contact with friends	How often do you have face-to-face contact with your friends?
	Level of loneliness	How often have you felt lonely in the last four weeks?
	Discrimination	Have you recently been discriminated against?
Subjective Wellbeing	Overall life satisfaction	How satisfied are you with life?
Cultural Identity	Ability to be oneself	How easy or hard is it for you to be yourself in New Zealand?

Source: Wellbeing indicators and survey questions from Statistics New Zealand GSS (2008-2018).

The structured interviews repeated the same questions and wellbeing indicators to assess wellbeing employees' before and after they joined their respective SE. The design of the interview facilitated insight into any changes in wellbeing that may have occurred for individuals during their involvement with the organisation. It is important to note participants recalled their wellbeing before joining a SE. It was understood participants could seek to provide answers considered favourable by the researcher. As outlined participants were informed prior to the interviews starting that there were no preferred answers, while their responses would be anonymised and not be shared with SE

management at any state. The interviews also collected additional information on SE employees. The interviews started with an assessment of socio-demographic characteristics. These variables included: age, gender, disability status and migrant status. The interviews also gathered information of individuals' prior and current employment history. These variables included: duration of employment at the SE; hours worked on average; job position; and employment status prior to SE.

The interviews concluded with two open ended questions that collected qualitative data. Open ended questions have no definitive response and contain answers that are recorded in full. The advantage of these questions is the potential for richness of responses, some of which may not have been expected or anticipated. However, the downside of open-ended questions is that while they are easier to answer they are also difficult to analyse. The data can seem varied and difficult to categorise; however, can be partly addressed using coding and the use of coding frames to identify themes (more details on analysis in section 5.6.3).

The open-ended questions provided opportunities for beneficiaries to provide further insights into their interactions and experiences working with a SE. The first question sought to identify any valued impacts on individuals' capabilities (opportunities and/or freedoms), and/or functionings (achieved states of being and doing). The initial stages of the interview broadly assessed employees' current wellbeing and their reported wellbeing before they joined a SE organisation. However, it was unclear if any of these impacts were valued by the beneficiaries themselves. The concept of 'value' is an integral aspect of the CA, with Sen himself stating*: "the expansion of 'capabilities' of persons' to lead the kind of lives they value – and have reason to value"* (Sen, 1999, p. 18). The final interview question encouraged participants to think about life outside their respective SE. It was designed to get individuals to think about the opportunities and/or freedoms available to them if they were not involved with a SE.

These concluding questions provided support for the impact evaluation. The difficulties associated with obtaining a counterfactual group meant qualitative comparatory analysis would be important for supporting claims linking SE employment to changes in wellbeing. The first question enabled interview participants to attribute impacts in wellbeing to their respective SEs. This provided supporting evidence for the quantitative data collected. The second question provided some insight into what may have happened if employees were not involved with a SE. The full questionnaire used in the structured interviews can be found in Appendix D.

5.6 Selection of social enterprise employees

The study sought to assess the impact employment-focused SEs had on the wellbeing of people. The population of interest consisted of individuals from marginalised communities who were the focus of

the SE employment efforts. Individuals from the management teams that led the organisations were considered outside the scope of the research and were not included in the sample group. As outlined in chapter 4, the previous studies that applied the CA in the context of the SE had often focused on SE management rather than the beneficiaries (Weaver, 2018, 2019). This research sought to focus on the individuals that were the target of the core social mission pursued by the SEs. It was recognised not all individuals from these organisations could be included due to time and budgetary constraints. A representative sampling technique was applied to gather a sample of individuals that were working for the organisations. The selection of participants was also facilitated by management from each SE organisation. This increased the risk of selection bias but was necessary to identify those willing and able to take part in the research. In total, 93 individuals were selected from five SEs around New Zealand.

The selection of participants required building considerable rapport and relationships with the SE organisations, management, and their employees. This was important to help address the potential limited trust held towards researchers. Vulnerable communities often have numerous reasons to mistrust researchers (Huslage et al., 2021). A lack of trust may stem from historical abuse or grievances but can also be reinforced by a range of other factors, including discriminatory institutional practises that are encountered daily by members of these communities. Trust can also be severed when researchers fail to verify their findings or report back results to those who devoted time to a study. Furthermore, research can easily misrepresent participants in their well-intentioned, though misguided presentation of findings (Huslage et al., 2021). It is important to recognise the systemic oppression and disempowerment individuals from marginalised communities may have faced. Participants can hold differing perceptions of researchers and authority, and these are often informed through culture and prior experiences. In addition, those deliberating over consent to participate may not feel comfortable declining due to the power differential between themselves and the researcher (Huslage et al., 2021). To address these issues, the researcher spent several days talking and immersing themselves in the SE work place environment. This helped to begin informal conversations with potential participants that addressed questions or concerns e.g., power/authority imbalances.

The selection of the employees for the most part was a smooth experience, with most expressing a strong desire to share their experiences and interactions with their SE organisation. However, several potential participants expressed their displeasure at someone approaching them to take part in the study. This was unexpected due to the amount of work devoted to building rapport and trust. It highlighted that research at the local level can often be ‘messy’ (Field et al., 2021). Existing literature has suggested standard practise can often omit the messiness of interviews when publishing research. Naveed et al (2017) suggested researchers can be under pressure to establish themselves

and may feel unable to admit their challenges in the field when such struggles seem to be rarely acknowledged in the wider community. Therefore, applying a reflexive approach was used to provide a more transparent account of the interview process. It helped to explore the messiness, unpredictability and dilemmas that occurred during the different stages of research (Field et al., 2021).

The interviews followed strict ethical requirements due to the inclusion of vulnerable human subjects. A report was submitted to the Lincoln University Ethics Committee detailing all ethical considerations. The comprehensive assessment ensured the highest ethical standards. It was recognised SE organisations employed individuals from diverse backgrounds that required careful consideration throughout the duration of the study. Research information sheets (RIS) and consent forms were distributed to all potential participants (refer to Appendix C). All individuals were given one week to read and consider taking part in the study. Participants were required to provide both written and verbal consent before they could take part in the interviews. Those that did not understand the study's purpose, risks and benefits involved, or their rights, were not included in the research. Each person was advised the interviews would be conducted at the location of the SE. If they did not feel comfortable, they were given the option of having the interview offsite. The participants were informed their responses would be anonymous.

As several SEs employed people with disabilities, particular thought was given to how these individuals could be included in the interviews. It was found people with intellectual and physical disabilities were often excluded from research (Horner-Johnson & Bailey, 2013; Lennox et al., 2005). The exclusion of these people was attributed to a range of factors including: a lack of power or influence; cognitive limitations; social isolation; or stringent research ethical requirements (Horner-Johnson & Bailey, 2013). A primary reason for exclusion often focuses on the ability of people with disabilities to provide informed consent. Consent in the context of this research was defined as voluntary agreement to participate in the study. Obtaining consent from participants involved informing them of their rights, the study's purpose and procedures, and the potential risks and benefits from participating in the research (Shahnazarian et al., 2013). This process sought to provide enough information so that all potential participants could make an informed decision about whether they wanted to take part in the study. The research information sheet (RIS) was written in such a way that could be understood by the potential participants. These documents were simplified where possible to help improve the documents readability. The RIS and consent form were guided by New Zealand's Health and Disability Ethics Committee, which was established to check if health and disability research met or exceeded ethical standards (HDEC, 2018). The committee provided useful insights, particularly around the use of non-technical language.

Many of the SEs employed Māori in their organisations. The 'Te Ara Tika document' (written by the Pūtaiora Writing Group) was examined to ensure that tikanga Māori (protocols, customs and practises) was adhered. It presented a Māori ethical framework that consisted of four principles: whakapapa, tika, manaakitanga, and mana. The first, whakapapa referred to the quality of relationships, and the structures and processes that are established to support these relationships. A consultative approach was adopted to ensure there was a constructive critique of the proposed research. The Lincoln University Ethics Committee provided constructive feedback when a research proposal was submitted. This ensured any potential impacts or risks for Māori were identified, mitigated, and effectively communicated to all participants. The second principle tika referred to what was right and what was good for any particular situation. In the context of research, it related to the validity of the proposed research. The design of the study was carefully considered as this was a determining factor in whether the research would be successful in achieving its proposed outcomes. The third principle manaakitanga referred to the ideas of cultural/social responsibility and respect for people. A culturally sensitive approach was adopted to preserve peoples' inherent dignity. All participants were given time to consult/seek advice from their whānau, and informed that their privacy and confidentiality would be maintained throughout the study. The final principle of mana referred to equity and distributive justice. The concept of mana tangata recognised that individuals were autonomous beings who had the right to choose to participate, and the right to be appropriately informed of the risk to their individual and/or collective mana.

5.7 Data analysis

The interviews collected quantitative and qualitative data on SE employees' wellbeing. The following section will address the approaches considered and applied during the analysis of this data. All interview responses were screened and checked for errors and missing values. The microdata obtained from Statistics New Zealand followed similar procedures. The variables used in the study were extracted, uploaded, and coded in preparation for analysis. In some cases, the questions varied slightly in wording and/or response categories across the 2008-2012 GSS which affected the coding of the variables. These are clearly identified throughout the results chapter. The customised tables containing data from the 2018 GSS required no additional input or coding as the data was aggregated.

A series of summary data tables were constructed for each of the wellbeing domains and their indicators. Each table contained the aggregated responses (%) from the interviews and the 2008-12 and 2018 GSS surveys. The tables were constructed around the aggregated data from the 2018 GSS. This contained the latest wellbeing data and was prioritised over the earlier surveys when constructing the summary data tables. The summary data tables contained employees' current

wellbeing, their recalled/reported wellbeing before joining a SE organisation, and the wellbeing of population groups in New Zealand.

A series of summary data tables were also constructed to assess the disabled population. These tables were considered necessary as a large proportion of the sample group had disabilities (*n* = 62). Each table contained the aggregated responses (%) from the interviews and the 2008 and 2018 GSS surveys. The wellbeing of disabled individuals was compared with the disabled and general population from these surveys. The 2008 and 2010 GSS were not included as individuals with disabilities could not be viewed in isolation from the rest of the general population. The microdata contained aggregated responses for individuals on the unemployment benefit, invalids' benefit, domestic purposes benefit and sickness benefit. This data included people that would not normally be grouped within the disabled population. As a result, a decision was made to exclude the 2008 and 2010 GSS from the summary data tables.

5.7.1 Assessment of wellbeing using New Zealand's Living Standards Framework Dashboard

The wellbeing of SE employees was then assessed using the dashboard from New Zealand's Living Standards Framework (LSF). As outlined previously, the LSF guided the initial selection of the wellbeing domains and indicators used in the interviews. The dashboard categorised individuals' as having either low, medium, or high wellbeing depending on their responses to the survey questions (see Table 5-6). Dichotomous variables were not assigned a medium wellbeing category, for example smoking status. The categorisation followed the LSF dashboard, however, some variables were not available on the dashboard and were categorised accordingly. The 'don't know' and 'refused' categories were transformed and an imputation procedure was carried out which replaced values with the mean value for the variable. Tables were constructed to assess the wellbeing of the sample group and to facilitate comparison with the general population in New Zealand. A separate table was also constructed to assess the wellbeing of employees with disabilities.

Table 5-6 Categories assigned to the wellbeing variables using the New Zealand's Living Standards Framework Dashboard.

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Source: Adapted from (McLeod, 2018).

5.7.2 Assessment of social enterprise employees' subjective wellbeing

This research also sought to assess the relationship between subjective wellbeing and the other wellbeing domains. As has been outlined, each wellbeing domains was assigned a corresponding functioning (achieved state of being and/or doing). The following section outlines the development of the data analysis procedures used to explore the explanatory factors behind SE employees' subjective wellbeing.

The use of subjective wellbeing was carefully considered, as it is recognised Sen expressed some criticism of subjective wellbeing while developing the CA. As outlined in chapter 3, Sen has been critical of utility-based approaches to wellbeing. It is argued subjective wellbeing considers only the mental attitude of a person, and fails to sufficiently consider the real physical condition of a person (physical-condition neglect) (Schokkaert, 2007). It is reasoned individuals can develop adaptive preferences. Renouard (2011) outlined a poor and undernourished person, for example, may value a life that is more comfortable, but may resign themselves to their current state, be happy with small comforts, desire only what is deemed realistic, or attempt no desire at all. Sen also argues subjective wellbeing exhibits valuation neglect, believing it is primarily concerned with psychological states, and not with what people value (Schokkaert, 2007). However, more recently capability literature has incorporated insights from subjective wellbeing into their research. Proponents argue the CA can be enriched through subjective wellbeing, while others outline 'being happy' or 'being satisfied with one's life' are valuable functionings that warrant further attention (Binder, 2014). Studies have also examined the relationships between subjective wellbeing and capabilities. For example, Paul Anand examined the extent to which capabilities influenced subjective wellbeing, that is to what extent was having freedoms a determinant of subjective wellbeing (Anand, 2016; Anand et al., 2005; Anand et al., 2011; Anand & Van Hees, 2006).

Empirical research that operationalises the CA apply statistical approaches that can be placed into several groups: fuzzy set theory (Baliamoune-Lutz & McGillivray, 2006; Garcés-Velástegui, 2020; Vero, 2006), multivariate data reduction (Basu & Das, 2020; Van Phan & O'Brien, 2019), scaling and ranking solutions, and regression (Anand et al., 2005; Lin & Chen, 2020). The scaling and ranking approach generally aggregates indicators that have different measurement units. These techniques provide a method for aggregating indicators with different units of measurement at the

macro-level, but face limitations dealing with more complex aspects of the CA. Fuzzy set theory was developed in recognition that it could be difficult to ascertain if states of being and/or doing had been clearly achieved or not achieved. It was recognised there were intermediate positions that represented partial degrees of achievement. The approach did not categorise in a binary form, but instead according to degrees of membership which was deemed important when categories had no clear cut-off, for example poor and not poor. Multivariate data analysis techniques such as principal component analysis, factor analysis, cluster analysis and multiple correspondence analysis are typically applied when dealing with large amounts of data. These techniques can help deconstruct large datasets and facilitate the aggregation of variables. Regression approaches are often applied to model relationships and their direction, magnitude and strength. These approaches seek to predict or explain multidimensional wellbeing, that is functioning or set of functionings against a dependent variable, for example, income. The regression approaches are often used to model functioning achievement, subjective wellbeing, and capability perception.

The strengths and weaknesses of the above approaches were considered, as well as their suitability in the context of this research. Multivariate data analysis and regression approaches were initially considered. The multivariate data approaches considered were principal component analysis (PCA) and cluster analysis. PCA reduced the dimensions within a large data set and transformed sets of variables in smaller ones, while seeking to retain most of the information in the large data set. Cluster analysis explored and identified structures within a data set. It sought to identify homogenous groups of cases within the data set. PCA and cluster analysis were not used as they were not able to explain relationships between the wellbeing variables. This research focuses on establishing relationships between employees' subjective wellbeing and other wellbeing domains. Regression offered a suitable approach for achieving this objective. This approach provided inferential and predictive power for assessing relationships between dependent (outcome variables) and independent variables (predicator variables).

A variety of regression procedures were available including standard linear regression, multiple linear regression, ordered probit and logit regression, and binomial and multinomial logistic regression. Standard linear regression estimates the relationship between one independent variable and one dependent variable. Multiple linear regression is an extension of the standard approach and estimates the linear relationships between one dependent variable and two or more independent variables. The ordered probit and logit regression models are cumulative ordinal models that are used to estimate the relationship between an ordinal dependent variable and a set of independent variables. Binomial logistic regression predicts the probability an observation fell into one of two categories on a dichotomous dependent variable based on one or more independent variables. Multinomial logistic regression is an extension of the binomial form and allows for a dependent

variable with multiple categories. These different approaches allow regression procedures to be carried out across a wide variety of data types.

Multiple linear regression and ordered probit/logit regression approaches were initially considered for the analysis. It was observed that both had been applied in capability research and used to model subjective wellbeing (Anand et al., 2005; Anand et al., 2011; Anand & Van Hees, 2006). This study decided to utilise multiple linear regression to assess the relationships between the wellbeing domains. The approach could accommodate a dependent variable measured on a continuous or ordinal level, and produced outcomes more intuitive to interpret than those generated by the probit and logit models. The procedure could assess two or more independent variables that contained nominal, ordinal, or continuous data. The regression models provided a means of objectively assessing the magnitude and direction of the linear relationships between the dependent and independent variables. The simultaneous assessment of independent variables also provided insight into the relative importance of each independent variable.

The application of multiple linear regression made several assumptions due to the use of an ordinal dependent variable. Firstly, the overall life satisfaction which was the measure of subjective wellbeing was assumed to be a continuous variable. It was also assumed overall life satisfaction was ordinally comparable, meaning individuals shared a common opinion around life satisfaction. Secondly, it was assumed overall life satisfaction responses were cardinally comparable, meaning the difference between one and two was equivalent to the difference between nine and ten on the scale. Existing literature has addressed these assumptions and concluded ordinal variables can applied in linear regression (Ferrer-i-Carbonell & Frijters, 2004; Fleche et al., 2012; McLeod, 2018; Smith, 2018; Stevenson & Wolfers, 2008). Ferrer-i-Carbonell and Frijters (2004) suggested in practice, there was little difference between estimates from linear regression and ordered probit models and suggested the assumption of cardinality was not unwarranted. Anand et al. (2005) used data from the British Household Panel Survey to assess the relationship between peoples' capabilities and life satisfaction. The study estimated ordered logit and probit models and reported the linear regression approach told an identical story when identifying and interpreting the coefficients. More recently, linear regression models have been used to assess subjective wellbeing in New Zealand see (Brown et al., 2012; Jia & Smith, 2016; McLeod, 2018).

A multiple linear regression examines the relationship between an outcome variable and two or more predictor variables. The unstandardised measure of a multiple linear relationship can be modelled using the following equation:

$$Y_i = (B_0 + B_1X_{1i} + B_2X_{2i} + ... + B_nX_{ni}) + \varepsilon_i$$

Y_i refers to the outcome variable. B_1 is the coefficient for the first predictor (X_{1i}), B_2 is the coefficient for the second predictor (X_{2i}), B_n is the coefficient for the *n*th predictor (X_{ni}). ε_i is the error term for the *i*th participant.

This research constructed four models to explore the explanatory factors behind subjective wellbeing. These examined the relationships between overall life satisfaction and the other domains of wellbeing. The initial models examined individuals' wellbeing before they joined their respective SE. As outlined earlier, this research relied on current employees' accurately recalling their wellbeing. The subsequent models explored the explanatory factors behind the changes individuals reported in subjective wellbeing after joining a SE organisation. Prior to running the regression analysis, the raw data was coded and screened. Several variables contained 'don't know' and/or 'refused' responses categories. An imputation process was conducted where the responses were replaced with the mean derived from descriptive statistics produced on the variable.

Employees' self-reported overall life satisfaction formed the dependent variable in the initial regression models. The life satisfaction of participants was assessed on a scale of 0-10, where zero meant an individual was completely dissatisfied and ten meant they were completely satisfied with their life. In total, 11 independent or explanatory variables were included (see Table 5-7). The models incorporated socio-demographic variables. These provided insight on the subjective wellbeing of different groups within the sample group. Dummy variables were constructed for each facilitating comparison between the socio-demographic groups. Age was broken up into three categories (15-24 years, 25-44 years, and 45-65 years). Ethnicity was condensed into four categories (New Zealand European, Māori, Pasifika, and Other). Dummy variables were constructed for gender and disability status and facilitated comparison between male and female, and disabled and non-disabled.

The models incorporated seven independent variables which represented the wellbeing domains and their corresponding functionings. Variables were selected that were considered representative of each wellbeing domain. For example, self-rated health status is an indicator of a person's overall health; and the level of loneliness experienced is an indicator of an individual's overall social connectedness. The use of representative variables helped reduce the risk of over-fitting the regression models. It was recognised the omission of variables may have resulted in some relevant explanatory variables or confounding variables being left out. It was understood this could affect coefficient estimates, as the models may attribute effects of omitted variables to the included variables. In these models' education was condensed into four dummy variables (no qualifications, school qualification, vocational qualifications, and tertiary qualifications) to facilitate comparison between the different levels.

Table 5-7 Wellbeing and socio-demographic variables in multiple linear regression models.

Wellbeing Domain	Wellbeing Variables
Education[1]	Highest form of qualification
Housing	Condition of housing arrangement
Health	Self-reported health status
Cultural Identity	Ability to be themselves
Social Connections	Level of loneliness experienced
Civic Engagement/governance	Level of trust for others
Jobs/Earnings	Sufficiency of income to meet every day needs
Socio-demographic Variables	**Variable Categories**
Age[1]	18-24, 25-44, 45-65
Ethnicity[1]	New Zealand European, Māori, Pasifika, Other
Gender[1]	Male, female
Disability Status[1]	Disabled, non-disabled

[1]Dummy variables created for education, disability status, gender, age, and ethnicity.

The subsequent regression models explored the explanatory factors behind the changes individuals reported after joining a SE. Prior to running these a series of tests were applied to assess if there was a statistically significant change in overall life satisfaction after individuals joined their respective organisation. Initially, a Wilcoxon signed-rank test was applied to see if the median difference between the paired observations was statistically significant. The test was the non-parametric equivalent to the paired-samples t-test. The data was tested for normality using the Shapiro-Wilk test. However, as the data was not normally distributed a paired-sample sign test was instead applied. The sign-test did not make any distributional assumptions. That is the shape of paired difference did not affect the running of the procedure. The sign-test analysis assessed the number of positive and negative differences between the paired observations and determined if the median of these differences in the sample group was statistically significant.

The regression models assessed changes in subjective wellbeing reported by individuals after joining a SE. The dependent variable assessed these changes on a scale that ranged from -10 to 10. For example, an individual may have recalled an overall life satisfaction of two before joining a SE, and then recorded a score of eight after joining the SE. In this example the difference between the scores was six fitting within the scale outlined. In total, 13 independent wellbeing, socio-demographic, and employment variables were included across the regression models (see Table 5-8). Socio-demographic variables provided insight on the reported changes in subjective wellbeing of different groups within the sample group. These dummy variables were the same as those outlined in the

initial regression models. Additional variables that assessed employees' prior employment status and the duration of their employment with a SE were also included.

The models incorporated seven independent variables which represented changes reported across the wellbeing domains and their corresponding functionings. The changes were assessed according to the responses individuals provided during the interviews. For example, employees' trust in others was assessed on a scale from 0-10, and changes could range from -10 to 10. If an employee reported their trust levels had improved from a seven to ten, the difference of three represented their reported change in trust. As explained earlier, the use of seven wellbeing variables was to avoid over-fitting the regression model. The education wellbeing variable in these regression models assessed if individuals had received a qualification since working with a SE. A dummy variable was constructed to compare the changes reported in life satisfaction between those who gained or not gained a qualification. These regression models explored if changes employees reported across the wellbeing domains affected the changes reported in subjective wellbeing. This provided insight into the relationships between employees' functionings.

Table 5-8 Wellbeing, socio-demographic, and employment variables included in the multiple linear regression models.

Wellbeing Domain	**Wellbeing Variable**
Education[1]	Attained a form of qualification
Housing	Reported changes in housing arrangement
Health	Reported changes in self-reported health status
Cultural Identity	Reported changes in ability to be express identity
Social Connections	Reported changes in level of loneliness
Civic Engagement/governance	Reported changes in the level of trust for others
Jobs/Earnings	Reported changes in income sufficiency
Socio-demographic Variables	**Variable Categories**
Age[1]	18-24, 25-44, 45-65
Ethnicity[1]	New Zealand European, Māori, Pasifika, Other
Gender[1]	Male, female
Disability Status[1]	Disabled, non-disabled
Employment Variables	**Variable Categories**
Duration of employment with SE	Years employment with SE
Prior employment status[1]	Employed, Unemployed

[1]Dummy variables categories created for age, ethnicity, disability status, and gender, education and prior employment status.

As outlined in the previous paragraphs it was recognised the selection of seven wellbeing variables could increase the risk of specification error. This occurred with inclusion of irrelevant variables or

the omission of relevant variables from the set of independent variables. The selection took into consideration the ratio of observations to independent variables. A desirable level is between 10-15 observations for each dependent variable (Green, 1991). If the ratio falls below 5:1 the model can run the risk of overfitting the variate to the sample which can make the results too specific to the sample (Green, 1991). The sample group (*n* = 93) in this research was sufficiently large enough for the inclusion of 13 independent variables and did not fall below the minimum threshold.

The independent variables were entered simultaneously into the regression models using the entry method. The alternative selection procedures included forward selection, backward selection, stepwise selection, and block-wise selection. These approaches included independent variables on the basis of their statistical contributions which allowed for the construction of an optimal regression equation. The entry method was considered an appropriate approach as a selection process had been carried out earlier based on statistical (sample size and prevention of over-fitting the model) and theoretical considerations (indicators representative of wellbeing domain). In addition, the simultaneous entry allowed all independent variables to be assessed in relation with one another.

Finally, the regression models were assessed for linearity, homoscedasticity, normality, multicollinearity, independence of observations, and unusual values. This ensured the models met the underlying requirements for a multiple linear regression procedure. The residual scatterplots were assessed for normality, linearity, and homoscedasticity. These were assessed to see if the residuals were normally distributed, exhibited a linear relationship, and showed constant variance. The Durbin-Watson test value was assessed for the independence of observations. Multicollinearity was assessed using variance inflation factors and a correlation matrix. The regression models were examined for unusual values that may have exerted excessive influence on the dataset and affected the estimation of the regression weights. If the regression models failed to meet these assumptions remedial action was taken and the model re-run. The models generated were assessed, and the adjusted R^2 value, model's goodness of fit and statistical significance was reported. In addition, the independent variables coefficients, their standard of error, and beta coefficients were reported and examined for their magnitude, direction, and statistical significance.

5.7.3 Assessment of valued impacts and life outside the social enterprise

The concluding questions of the structured interviews collected qualitative data which was assessed used Nvivo data analysis software. The questions looked at the valued impacts the SE organisations had on individuals' lives, and asked participants to also consider what their life would be like if they were not employed with a SE. The qualitative responses provided additional context on the impact SE organisations had on their beneficiary's wellbeing. It provided insight into the 'reality of participants' lived experiences; the physical, economic, political and social contexts in which they

lived, and provided insights into their capabilities and achieved functionings. As outlined in chapter 3, the CA offers an alternative assessment of SE social value creation, and can be used to capture societal-level factors, beneficiary perspectives, and a more holistic view of a beneficiary's life (Kato et al., 2017). The qualitative aspects of the structured interviews sought to generate knowledge grounded in human experience. This offered valuable insights but needed to be analysed in a rigorous and methodical manner to generate meaningful results. This research applied a thematic approach to the analysis of the data collected from the open-ended questions.

Thematic analysis (TA) is a method for identifying, analysing, and interpreting thematic patterns within qualitative data. TA offers a method – a tool or technique, that can be applied across a range of theoretical frameworks and research paradigms. TA generates codes that capture interesting features of the data that are relevant to the research question(s). These codes form the building blocks of the themes and are underpinned by a central organising concept. TA does not seek to simply summarise data content, but to also identify and interpret key features of the data, guided by the research questions. TA offers a flexible approach for identifying patterns in data in relation to SE employees' lived experiences, views and perspectives, behaviours and practises, and seeks to better understand what they thought, felt, and did.

This research applied a TA framework to provide direction for the analysis of the data collected from the open-ended questions. Braun & Clarke (2006) laid out a thematic analysis framework which guided the data analysis process. The framework contained 6 phases including: 1) familiarising oneself with the data; 2) generating initial codes; 3) searching for themes; 4) reviewing the themes; 5) defining and naming the themes; and 6) writing-up the final report (Maguire and Delahunt, 2017). Trustworthiness was established through reflexive thinking, triangulation, detailed and systematic note keeping and peer debriefing. An inductive (data driven) approach was applied to the analysis which helped to capture meaning from the data.

5.8 Conclusion

This chapter has addressed the research methodology applied in this thesis. As outlined in chapter one, the aim of this study is to assess the impact SEs have on peoples' wellbeing. It focuses on organisations whose mission is the provision of employment opportunities for individuals from marginalised communities. These SEs were chosen as they had a clear social mission; pursued commercial revenue gathering activities; and had employees that could be assessed. A before-and-after impact approach was selected due to difficulties associated with finding a suitable counterfactual group. This chapter outlined measures implemented to compensate for the absence of this group, including the use of Statistics New Zealand GSS surveys which provided suitable comparatory populations. Amartya Sen's CA has been used to conceptualise wellbeing around

individuals' capabilities and functionings. This chapter addressed the operationalisation and practical implementation of the approach. Structured interviews were used to examine employees' achieved states of being and doing. A series of wellbeing summary data tables were constructed, while New Zealand's LSF dashboard was also used to view the sample group's wellbeing. Multiple linear regression was selected to explore the explanatory factors behind employees' subjective wellbeing, and the relationships between functionings. The following chapter will now address the key findings and results from this research.

Chapter 6

Results

6.1 Introduction

This chapter presents the key results and findings from the structured interviews conducted with SE employees. It begins with a brief outline of the SE organisations and socio-demographic characteristics of the sample group. The chapter then examines the sample group's wellbeing, comparing it with New Zealand's general population. This is followed with an assessment of disabled employees' wellbeing. As outlined in chapter 5, this research was reliant on participants recalling life and their wellbeing prior to joining a SE. The chapter then explores the explanatory factors behind employees' subjective wellbeing, and presents the results from the multiple linear regression models. The chapter concludes with employees' personal perspectives and experiences. These focus around the valued impacts on their lives and their opportunities and freedoms outside the SE. This chapter focuses on SE employees' functionings or achieved states of being and doing, and explores the changes reported in wellbeing.

6.2 Social enterprise organisations and the socio-demographic characteristics of the employees'

The sample group consisted of 93 individuals across five separate SE (see Table 6-1). The SEs were located in Northland, Auckland, Christchurch and Dunedin. The organisations operated across a variety of sectors including transport logistics, manufacturing, and construction. These groups provided employment opportunities for populations that experienced social and economic exclusion.

Table 6-1 Social enterprise organisations and the number of employees interviewed.

Social Enterprise	Number of SE employees interviewed
Organisation A	16
Organisation B	14
Organisation C	30
Organisation D	30
Organisation E	3
Total	93

The sample group contained a diverse range of individuals (see Table 6-2). In total, 56 males (60.2 per cent) and 37 females (39.8 per cent) were involved in the interviews. The youngest person interviewed was 18 and the oldest was 71 years old, while the median age of participants was 37 years old. In total, 76 individuals (81.7 per cent) identified with a single ethnic group; of these 56

individuals (64.4 per cent) identified as New Zealand European, and 21 individuals (17.1 per cent) identified as Māori. There were 17 participants (18.3 per cent) that reported multiple ethnicities. There were 62 respondents (66.7 per cent) that identified as having some sort of physical or mental disability, while 30 (32.3 per cent) identified as having no disability, and one individual that gave no response. There were 80 respondents (74.4 per cent) who were born in New Zealand, two who had recently migrated to the country (within the last five years), and 11 (10.23 per cent) who were long-term migrants (longer than five years).

Table 6-2 Socio-demographic characteristics of the sample group.

Socio-demographics	Sub-groups	Count (n)	Percentage (%)
Gender	Male	56	60.2
	Female	37	39.8
Age	18-24 years	19	20.4
	25-44 years	37	39.8
	45-65 years	37	39.8
Ethnicity (single)	New Zealand European	56	60.2
	Māori	21	22.6
	Pasifika	11	11.8
	Other	5	5.40
Disability status[1]	Disabled	62	66.7
	Non-disabled	30	32.2
Birthplace	New Zealand	80	74.4
	Short-term migrant (>5 years)	2	1.86
	Long-term migrant (<5 years)	11	10.2
Spouse	Living with partner	21	22.6
Employee type	Full-time worker	69	74.2
	Part-time worker	24	25.6
Prior employment	Yes	50	53.8
	No	46	46.2

[1] One individual did not provide information.

6.3 Comparing social enterprise employees' wellbeing with New Zealand's general population

This section explores the wellbeing of SE employees. The wellbeing of the sample group is compared with New Zealand's general population from Statistics New Zealand 2008, 2010, 2012 and 2018 General Social Survey (GSS). As outlined in chapter 5, the primary and secondary data is aggregated

and placed on summary tables. These are presented and referred to throughout the following section. Those not included can be found in Appendix E. The section begins with a summary table of descriptive statistics for each wellbeing domain and its respective indicators (see Table 6-3). This table contains the primary data collected.

Table 6-3 Summary of descriptive statistics for each wellbeing domain and their indicators.

Wellbeing Indicators[1]		Mean	Median	Mode	STD	Min	Max
Overall life satisfaction	B	5.34	5.00	5.00	2.768	0.00	10.0
	A	8.03	8.00	10.00	1.986	1.00	10.0
Highest qualification	B	1.88	2.00	1.00	0.858	1.00	4.00
	A	2.44	3.00	3.00	0.804	1.00	4.00
Self-reported health status	B	3.20	3.00	4.00	1.185	1.00	5.00
	A	3.51	4.00	4.00	1.028	1.00	5.00
Smoking status	B	1.65	2.00	2.00	0.470	1.00	2.00
	A	1.73	2.00	2.00	0.446	1.00	2.00
Ability to be oneself	B	3.47	3.00	3.00	1.332	1.00	7.00
	A	3.90	4.00	5.00	1.189	1.00	7.00
Discrimination	B	1.83	2.00	2.00	0.503	1.00	3.00
	A	1.87	2.00	2.00	0.448	1.00	3.00
Trust in others	B	5.57	5.00	5.00	2.564	1.00	10.0
	A	6.87	7.00	5.00	2.158	1.00	10.0
Voting status	B	1.58	2.00	2.00	0.538	1.00	3.00
	A	1.69	2.00	2.00	0.448	1.00	3.00
Level of Loneliness	B	2.45	2.00	2.00	1.058	1.00	4.00
	A	3.12	3.00	4.00	0.987	1.00	4.00
Contact with family	B	4.20	5.00	5.00	1.364	1.00	6.00
	A	3.97	5.00	5.00	1.456	1.00	6.00
Contact with friends	B	3.31	4.00	4.00	1.429	1.00	6.00
	A	4.28	5.00	5.00	1.015	1.00	6.00
Help in a crisis	B	1.89	2.00	2.00	0.403	1.00	3.00
	A	1.97	2.00	2.00	0.178	1.00	2.00
Income level	B	5.01	5.00	5.00	1.815	1.00	13.0
	A	5.38	5.00	5.00	0.999	2.00	9.00
Income sufficiency	B	2.24	2.00	2.00	1.057	1.00	5.00
	A	2.59	3.00	3.00	0.924	1.00	5.00
Condition of housing	B	3.95	4.00	5.00	1.644	1.00	7.00
	A	4.23	5.00	5.00	1.344	1.00	7.00
Coldness a major issue	B	3.15	3.00	4.00	1.093	1.00	6.00
	A	3.39	4.00	4.00	1.022	1.00	5.00
Dampness/mould a major issue	B	2.57	3.00	3.00	0.813	1.00	5.00
	A	2.81	3.00	3.00	0.798	1.00	5.00

[1]Each variable is split in two. 'B' denotes before employment with the SE. 'A' denotes after employment with the SE.

The subjective wellbeing of individuals was guided by a single variable that assessed self-reported overall life satisfaction. A 0-10 scale was applied where zero represented complete dissatisfaction and ten represented complete satisfaction with life. Participants were asked to recall their overall life

satisfaction before and after joining the organisation. The average overall life satisfaction of individuals (*n* = 93) prior to working at the SE was 5.34 ± 2.76, while the average overall life satisfaction of individuals (*n* = 93) after joining the SE was 8.03 ± 1.98. Overall, there was an increase of 2.69 in the mean overall life satisfaction after individuals were employed with the SE organisation. The median overall life satisfaction score before joining the SE was 5.00, while the median score was 8.00 after joining the SE. After employment with the SE, there was an increase in the number of individuals that recorded an overall life satisfaction between 7-10, and a reduction in the number of individuals that recorded overall life satisfaction between 0-4 (see Figure 6-1).

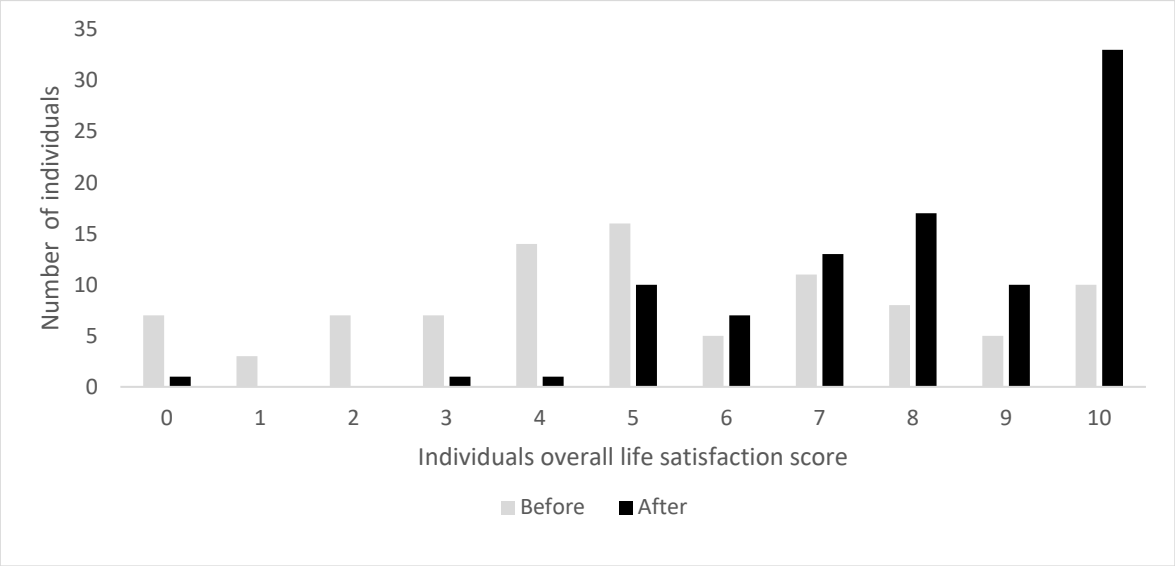

Figure 6-1 Reported overall life satisfaction of sample group before and after joining the SE.

The change in overall life satisfaction of employees was assessed across socio-demographics: disability status, gender, ethnicity, and age brackets (see Table 6-4). This provided an overview of reported changes in subjective wellbeing across the different population groups within the sample group. All groups reported some improvement in overall life satisfaction after their employment with the SE organisations. It was found some reported larger changes compared with other demographic groups. Individuals aged between 18-24 years experienced a large change in overall life satisfaction (Δ = 4.16). In comparison, individuals aged between 25-44 years experienced on average a smaller change (Δ = 2.43). Māori and Pasifika also reported a positive change in subjective wellbeing (Δ = 3.00; Δ = 3.26) while New Zealand European participants reported a smaller positive change (Δ = 2.71).

Table 6-4 Overall life satisfaction (avg) before and after joining the SE organisation across different socio-demographic variables.

		Overall life satisfaction		
		Before (avg)	**After (avg)**	**Change (avg)**
Disability Status[1]	Disabled (n=62)	5.29	8.15	2.95
	Non-disabled (n=30)	5.47	7.90	2.67
Gender	Male (n=56)	5.20	7.75	2.77
	Female (n=37)	5.57	8.46	2.92
Ethnicity	NZ European (n=56)	5.23	7.84	2.71
	Māori (n=21)	5.71	8.38	3.00
	Pasifika (n=11)	5.18	8.45	3.27
	Other (n=5)	5.40	7.80	2.40
Age	18-24 years (n=19)	4.05	8.26	4.16
	25-44 years (n=37)	5.65	7.89	2.43
	45-65 years (n=37)	5.75	8.06	2.50

[1]An individual did not provide their disability status.

The subjective wellbeing of the sample group was compared with secondary data sources (see Table 6-5). The interviews found 63.4 per cent of employees recalled having an overall life satisfaction of between 0 and 6 prior to working with a SE. This was higher than the 2008-2012 and 2018 GSS where between 14.8 and 18.9 per cent reported an overall life satisfaction between 0-6. After joining the SE 21.6 per cent of participants reported an overall life satisfaction of between 0-6. This represented a 41.8 per cent decrease compared with their responses concerning life before employment with a SE. Prior to joining a SE 16.2 per cent of participants recalled having an overall life satisfaction of 9 or 10. This increased 25.6 per cent to 46.3 per cent after joining the SE. In comparison, the 2018 GSS found 18.9 per cent of the general population had an overall life satisfaction of between 0 and 6 which was slightly lower than individuals after joining the SE. The 2018 survey also found 31.9 per cent reported an overall life satisfaction of 9 or 10, which was also lower than individuals after joining the SE. The interview data shows many employees reported being more satisfied overall with their lives after joining a SE. The differences between the 2018 GSS and other GSS surveys could be attributed to the use of different measurement scales. The earlier surveys (2008-12) utilised a five-point scale ranging from 'very dissatisfied' to 'very satisfied'. These surveys were standardised according to the 0-10 scale used in later GSS surveys in order to facilitate comparison with the primary data collected. An explanation of the process is provided in the footnotes of the table (see Table 6-5).

Table 6-5 Employees' overall life satisfaction in comparison with New Zealand's general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Overall life satisfaction		
	0-6	**7-8**	**9-10**
Stats NZ GSS 2008[1]	15.3	53.5	30.9
Stats NZ GSS 2010[1]	14.8	53.3	31.8
Stats NZ GSS 2012[1]	15.4	53.4	31.1
Stats NZ GSS 2018	18.9	49.3	31.9
Employees prior to SE	63.4	20.4	16.2
Employees after SE	21.6	32.3	46.3

[1]Different scales used in the surveys. Individuals that identified as 'very dissatisfied'; 'dissatisfied'; or 'no feeling either way' were considered to have a life satisfaction score between 0-6. Individuals that identified as 'satisfied' were considered to have a life satisfaction score between 7-8. Individuals that identified as 'very satisfied' were considered to have a life satisfaction score between 9-10.

The health wellbeing domain was examined using two variables: self-reported health and smoking status. Participants were asked to consider their health before and after joining the SE. They were provided a scale that ranged from poor to excellent health. As seen in Table 6-6, 31.2 per cent of employees recalled being in fair/poor health prior to joining a SE. This was considerably higher than 14.7 per cent reported in the 2018 GSS. After joining a SE organisation 15.1 per cent of employees reported their current health status was fair/poor. This represented a 16.1 per cent decline, and brought the sample group closer to figures reported by the general population. More employees reported being in good, very good, or excellent health since working with a SE. Most notably there was an 8.6 per cent increase in those reporting to be in good health. The data overall shows more employees considered themselves to be healthier after joining a SE. Employment may have contributed to the improved health status of some individuals.

Table 6-6 Employees' self-reported health status in comparison with New Zealand's general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Self-rated health status			
	Fair/poor	Good	Very Good	Excellent
Stats GSS 2008	14.8	27.7	36.3	21.2
Stats GSS 2010	15.1	28.1	35.1	21.7
Stats NZ GSS 2012	15.9	27.6	35.6	20.9
Stats NZ GSS 2018	14.7	30.0	38.8	16.5
Employees prior to SE[1]	31.2	24.7	29.0	15.1
Employees after SE[1]	15.1	31.2	37.6	16.1

[1]Fair/poor categories combined to facilitate comparison with the aggregated 2018 GSS data tables from Statistics New Zealand.

The interviews found the smoking habits of SE employees changed very little. The percentage of individuals that reported smoking regularly declined slightly from 32.3 per cent to 26.9 per cent. Although it declined it still was considerably higher compared with the 2018 GSS data, which found 14.8 per cent of the general population were regular smokers (see Table E 3). Closer inspection of the primary data showed a higher percentage of Māori and Pasifika employees were regular smokers compared with other ethnic groups. The findings are consistent with similar trends from the Ministry of Health that show Māori and Pasifika populations are 2.7 times more likely to smoke compared with other ethnic groups (Ministry of Health, 2018). The data overall suggests employment with a SE did little to alter the smoking habits of many individuals.

The cultural identity domain of wellbeing prompted individuals to reflect on how easy or difficult it had been to express their lifestyle, culture, and beliefs before and after they joined a SE organisation. The data found fewer individuals reported significant difficulty expressing their identity after joining a SE. The interviews found 22.6 per cent of the sample group recalled finding it 'very hard' or 'hard' to express their identity prior to SE employment (see Table E 4). This declined to 7.6 per cent when participants reported on their current situation. The data suggests some employees faced persistent obstacles/barriers that affected their expression of personal identity. In comparison, just 1.9 per cent of the general population reported considerable difficulties expressing their own identity. SE employees that reported finding it very easy increased from 19.4 per cent to 34.4 per cent. This research overall found more employees reported being able to express their identity more easily after joining a SE.

The civic engagement and governance wellbeing domain assessed employees' participation in civic duties and their trust for others in New Zealand. The interviews observed more individuals reported being actively engaged in politics after joining a SE. The percentage of regular voters increased from 53.8 to 66.7 per cent (see Table E 5). Voter engagement remained lower than the general population where between 81.2 and 82.1 per cent voted in the general elections. The interviews assessed employees' level of trust in others (see Table 6-7). It implemented a 0-10 scale where zero was completely untrusting of others and ten was completely trusting of others. Employees often recalled having low levels of trust in their fellow New Zealanders before being employed with a SE. The interviews found 33.4 per cent of the sample group reported between 0-4 on the trust scale. This declined considerably with 11.9 per cent of employees reporting similar levels after joining a SE. In comparison only six per cent of the general population in the 2018 GSS reported these lower levels of trust. The interviews observed a broad increase in trust amongst the sample group. Employees who reported high levels of trust (9-10) increased from 11.8 to 26.9 per cent after joining a SE. This was higher than New Zealand's general population where 15.1 per cent expressed having similar levels of trust. The average level of trust reported by the sample group (n = 93) increased from 5.57 ± 2.56 to

6.87 ± 2.15 after joining at SE. Overall, the data shows individuals reported increased levels of trust after their employment started with a SE.

Table 6-7 Employees' level of trust in comparison with New Zealand's general population derived from Statistics New Zealand 2018 general social survey (%).

	Trust in others[1]				
	0-2	3-4	5-6	7-8	9-10
Stats NZ GSS 2018	1.9	4.1	28.1	50.8	15.1
Employees prior to SE	14.0	19.4	25.8	29.0	11.8
Employees after SE	2.2	9.7	32.3	29.0	26.9

[1]Data unavailable from 2008-12 Statistics New Zealand GSS CURF.

The social connections domain of wellbeing assessed individuals experience of loneliness, connections with their friends and family, ability to obtain help during a period of crisis, and experience of discrimination. The level of loneliness experienced was assessed using a scale that ranged from 'none of the time' to 'all of the time'. The interviews revealed the sample group reported high levels of social isolation and loneliness before their involvement with their SE (see Table 6-8). The data shows 21.5 per cent felt lonely most/all of the time. New Zealand's general population reported less social isolation, and only 3.5 per cent in 2018 GSS reported strong loneliness. The data shows reported loneliness declined amongst the sample population after joining a SE. Those reporting loneliness most or all of the time declined from 21.5 to 8.6 per cent. Those never feeling lonely increased from 21.5 to 46.2 per cent; however, this was still remained lower than New Zealand's general population. The interviews reveal loneliness declined amongst the sample group after employment with a SE. There were fewer individuals that reported feeling acute levels of loneliness. The data overall indicates SEs may have facilitated opportunities for increased social interaction.

Table 6-8 Employees' reported levels of loneliness in comparison with New Zealand's general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Level of loneliness experienced				
	None of the time	A little of the time	Some of the time	Most/all of the Time	RF/DK[2]
Stats NZ GSS 2008[1]	65.3	17.0	13.1	4.3	0.3
Stats NZ GSS 2010[1]	67.1	16.5	12.4	3.9	0.1
Stats NZ GSS 2012[1]	68.4	15.2	12.1	4.1	0.2
Stats NZ GSS 2018	61.0	22.4	13.1	3.5	0.0
Employees prior to SE	21.5	23.7	33.3	21.5	0.0
Employees after SE	46.2	28.0	17.2	8.6	0.0

[1]GSS 2008-12 focused around 'social isolation' compared with 'loneliness' in 2018 GSS. [2]Repondents refused to answer or didn't know.

The level of face-to-face contact with friends and family provided insight into the social connectedness of the sample group. It was assessed on a scale that ranged from daily contact to no contact at all. The interviews found 18.3 per cent recalled having no contact with friends prior to working with a SE (see Table E 9). After joining their respective SE only 3.2 per cent of the sample group reported no contact. The 2018 GSS found 7.1 per cent of the general population reported being in a similar position. The sample group reported increased frequency of connection with friends and social networks after joining a SE. Those that had daily contact increased from 22.6 per cent to 51.6 per cent. The GSS found 26.8 per cent of the general population in 2018 reported a similar level of daily interactions. The sample group reported an increased frequency of connection with friends after joining a SE. This likely reflected more opportunities for social interactions. These findings contrasted strongly with the reported contact individuals had with their families. The interviews found the sample population reported having less daily contact with their families after joining a SE (see Table E 8). Those that had daily contact declined from 58.1 per cent to 46.2 per cent. Despite this reduction it remained higher than the 20.1 per cent reported in 2018 by New Zealand's general population. The interviews with SE employees revealed increased daily connection with friends, and a decline in daily contact with family.

The interviews also assessed individuals' ability to access help in a crisis and their experiences of discrimination. Those that reported having access to help increased from 82.8 per cent to 96.8 per cent after joining a SE (see Table E 10). This closely aligned with 2008-12 GSS which found around 96 per cent of the general population could get access to help in a crisis. Although most of the sample group could access help before joining a SE. The data suggests the organisations may have provided some individuals with an additional avenue of support. The interviews found those that experienced discrimination declined from 22.6 to 17.2 per cent after involvement with SE organisations (see Table E 11). This closely aligned with the general population from the 2018 GSS where 17.4 per cent of respondents reported recent discriminatory experiences. The interviews found a large portion of the sample group after joining a SE still reported experiencing discrimination.

The jobs and earnings wellbeing domain assessed individual's income levels and if it was sufficient to meet their everyday needs. In the context of this study, income referred to all earnings from wages, salaries, and benefits received from the government. The average income bracket of the sample group prior to their employment with the SE was $20,000-30,000 (see Table E 13). The data showed there was a small increase in the average annual income received by individuals; however, this was not large enough to affect the overall average income bracket of the sample group. The income data did show non-disabled individuals experienced an increase in income. It was found their average annual income bracket increased from $20,000-30,000 to $30,000-40,000. There was no change in

the annual income bracket of those with disabilities, which could likely be attributed to their involvement with the minimum wage exemption scheme.

The interviews asked participants to assess the sufficiency of income earnt before and after joining a SE. This research found 31.2 per cent of the sample group reported they received insufficient income prior to working for a SE (see Table 6-9). These participants believed they did not have enough money to meet their daily needs. This declined 18.3 per cent to 12.9 per cent when individuals considered their incomes levels after working for the SE. In comparison the 2018 GSS found 10.0 per cent of the general population did not have enough money to meet their everyday needs. The data showed individuals that reported having enough money increased from 28.0 per cent to 40.9 per cent after employment with a SE. Despite an increase this remained lower than the general population in the 2018 GSS. The data shows more individuals within sample population reported earning an income that was sufficient to meet their daily needs after joining a SE.

Table 6-9 Employees' perceptions of income sufficiency in comparison with New Zealand's general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Income sufficiency to meet every day needs				
	Not enough	Only just enough	Enough	More than enough	RK/DK[2]
Stats NZ GSS 2008	15.1	33.4	38.3	13.0	0.2
Stats NZ GSS 2010	16.0	33.2	37.5	13.3	0.1
Stats NZ GSS 2012	16.4	32.9	36.5	14.1	0.1
Stats NZ GSS 2018[1]	10.0	27.1	44.4	18.4	-
Employees prior to SE	31.2	28.0	28.0	11.8	1.1
Employees after SE	12.9	31.2	40.9	14.0	1.1

[1]Data not available for refused or don't know
[2]Repondents refused to answer or didn't know

The housing wellbeing domain assessed the condition of individuals' living arrangements. The interviews initially focused on the overall condition of their housing (see Table E 14). The interviews found 12.9 per cent of the sample group recalled the housing they occupied prior to joining a SE needed significant work. When asked about their current housing situation 5.4 per cent of employees believed their current housing needed substantial work. In comparison the 2018 GSS found 4.2 per cent of individuals reported occupying a similar condition of housing. The interviews found 42.5 per cent of sample group believed their current housing arrangements required no work. In comparison 30.5 per cent of the general population in the 2018 GSS reported occupying housing that needed no work. The data overall shows some individuals reported living in better housing conditions after joining a SE.

The interviews then examined if their housing arrangements had issues with being too cold, dampness or mould. The data showed fewer individuals believed their current housing arrangements had issues with being too cold (see Table E 15). The interviews found 53.8 per cent of the sample group reported no problem. In comparison 45.4 per cent of the general population in the 2018 GSS believed their housing did not have an issue with coldness. The interviews also showed fewer individuals believed their current housing had issues with dampness or mould (see Table E 16). Those that reported dampness/mould was a major issue declined from 10.8 to 4.3 per cent. This closely aligned with findings in the 2018 GSS where 5.4 per cent of the general population reported occupying similar housing. The data collected during the interviews show the housing conditions of some individuals improved with fewer reporting significant issues with cold or dampness/mould.

The education domain of wellbeing assessed the qualifications attained by the sample group. The interviews focused on the highest qualification individuals managed to obtain (see Table 6-10). Prior to joining their SE organisation 39.8 per cent of individuals reported holding no qualifications. It was found only 3.2 per cent of the sample group had gained a tertiary qualification. In comparison 25.0 per cent of the general population in the 2018 GSS had obtained this level of education. The interviews found individuals that reported having a vocational qualification increased from 21.5 per cent to 57.0 per cent after joining a SE. The lower education levels amongst the sample population reflected participants experiences at school. The interviews observed 54.8 per cent of interviewees had left school early, with 10.8 per cent reporting they had left before fifth form (year 11). This research identified a large increase in vocational qualifications amongst the sample population. It is suggested SE organisations may have provided opportunities for individuals to gain experiences, skills and qualifications.

Table 6-10 Highest qualifications held by SE employees in comparison with New Zealand's general population derived from Statistics New Zealand 2018 general social survey (%).

	Highest qualification attained[1]				
	No qualification	School qualification	Vocational qualification	University qualification	Other
Stats NZ 2018 GSS	44.0	7.1	19.7	25.0	4.2
Employees prior to SE	39.8	35.5	21.5	3.2	0.0
Employees after the SE[2]	19.4	20.4	57.0	3.2	0.0

[1]Vocational qualifications referred to any qualification received post-secondary school. These included pre-vocational certificates, bridging certificates, trade certificate, national certificate, advanced trade certificates, undergraduate diploma/certificate, national diploma, NZ diploma. University qualifications referred included bachelor's degrees and anything higher. Other qualifications refereed to overseas qualifications and any other qualification not listed by Stats NZ.
[2]Any qualification gained by an SE employee was considered a vocational qualification.

6.4 Comparing disabled social enterprise employees' wellbeing with New Zealand's general and disabled population

The following section will briefly outline the wellbeing of disabled SE employees. A large proportion (*n*=62) of the sample group consisted of individuals with physical and/or mental disabilities and their wellbeing was explored separately. The data collected from the interviews was compared with the general and non-disabled population groups from the 2008 and 2018 Statistics New Zealand GSS. The 2010 and 2012 GSS were excluded due to data constraints with the CURF microdata. As outlined in chapter 5, in these survey's individuals with disabilities had been grouped with those on the unemployment benefit, invalids' benefit, domestic purposes benefit, or sickness benefit. These datasets included individuals not typically included within the disabled population, and are therefore not included in the subsequent analysis. The following section presents summary tables and are referred to when needed. Those not included can be found in Appendix F. This section begins with a summary table of descriptive statistics for each wellbeing domain and its respective indicators (Table 6-11). This table contains the primary data collected.

Table 6-11 Summary of descriptive statistics for each wellbeing domain and their indicators.

Variable		Mean	Median	Mode	STD	Min	Max
Overall life satisfaction	B	5.29	5.00	5.00	2.769	0.00	10.0
	A	8.15	9.00	10.00	2.095	1.00	10.0
Highest qualification	B	1.69	2.00	1.00	0.781	1.00	4.00
	A	2.35	3.00	3.00	0.851	1.00	4.00
Self-reported health status	B	3.05	3.00	3.00	1.047	1.00	5.00
	A	3.47	3.00	3.00	1.036	1.00	5.00
Smoking status	B	1.77	2.00	2.00	0.422	1.00	2.00
	A	1.84	2.00	2.00	0.371	1.00	2.00
Ability to be oneself	B	3.37	3.00	3.00	1.159	1.00	6.00
	A	3.73	4.00	3.00	1.133	1.00	6.00
Discrimination	B	1.85	2.00	2.00	0.474	1.00	3.00
	A	1.89	2.00	2.00	0.477	1.00	3.00
Trust in others	B	5.37	5.00	5.00	2.613	1.00	10.0
	A	6.68	6.00	5.00	2.317	1.00	10.0
Voting status	B	1.66	2.00	2.00	0.542	1.00	3.00
	A	1.74	2.00	2.00	0.447	1.00	3.00
Level of Loneliness	B	2.37	2.00	2.00	1.044	1.00	4.00
	A	3.10	3.50	3.00	1.051	1.00	4.00
Contact with family	B	4.34	5.00	5.00	1.280	1.00	6.00
	A	4.02	5.00	5.00	1.477	1.00	6.00
Contact with friends	B	3.15	3.00	4.00	1.424	1.00	5.00
	A	4.32	5.00	5.00	1.477	1.00	6.00
Help in a crisis	B	1.95	2.00	2.00	0.381	1.00	3.00
	A	1.98	2.00	2.00	0.127	1.00	2.00
Income level	B	4.84	5.00	5.00	1.119	1.00	8.00
	A	5.02	5.00	5.00	0.587	2.00	8.00
Income sufficiency	B	2.26	2.00	2.00	1.007	1.00	4.00
	A	2.53	3.00	3.00	0.900	1.00	5.00
Condition of housing	B	4.06	4.00	5.00	1.668	1.00	7.00
	A	4.31	5.00	5.00	1.421	1.00	7.00
Coldness a major issue	B	3.19	3.00	4.00	1.084	1.00	6.00
	A	3.35	4.00	4.00	1.010	1.00	5.00
Dampness/mould a major issue	B	2.61	3.00	3.00	0.856	1.00	5.00
	A	2.90	3.00	3.00	0.844	1.00	5.00

[1]Each variable is split in two. 'B' denotes before employment with the SE. 'A' denotes after employment with the SE.

A large proportion of the disabled employees recalled having a low overall life satisfaction prior to working at a SE (see Table 6-12). The interviews found 66.1 per cent of the disabled sample group expressed a life satisfaction score between 0-6. This was considerably higher than both the disabled and general population in the 2018 GSS. The secondary data shows the disabled individuals reported

a lower satisfaction with life than the general population. This is consistent with findings from this research, which found the disabled employees reported lower subjective wellbeing than the sample group as a whole. Disabled employees reported feeling more satisfied with life after joining their respective SE organisations. Those that expressed a high satisfaction with their life increased substantially from 16.1 per cent to 51.6 per cent. This was higher than the 26.0 per cent and 31.9 per cent reported by the disabled and general population respectively in the 2018 GSS. The findings show improved subjective wellbeing amongst the disabled sample group after joining a SE.

Table 6-12 Disabled employees' overall life satisfaction in comparison with New Zealand's disabled and general population derived from Statistics New Zealand and 2008 and 2018 general social survey (%).

	Overall life satisfaction		
	0-6	7-8	9-10
Stats NZ GSS 2008 (Disabled)[1]	25.8	50.1	23.8
Stats NZ GSS 2008 (General)[1]	15.3	53.5	30.9
Stats NZ GSS 2018 (Disabled)[1]	35.2	38.7	26.0
Stats NZ GSS 2018 (General)[1]	18.9	49.3	31.9
Disabled employees prior to SE	66.1	17.8	16.1
Disabled employees after SE	21.0	27.5	51.6

[1]Different scales used in the surveys. Individuals that identified as 'very dissatisfied'; 'dissatisfied'; 'no feeling either way' were considered to have an overall life satisfaction score between 0-6. Individuals that identified as satisfied were considered to have an overall life satisfaction score between 7-8. Individuals that identified as very satisfied were considered to have an overall life satisfaction score between 9-10.

The interviews found some disabled employees in the sample group considered themselves in better health since joining a SE (see Table 6-13). Those that reported being in poor/fair health declined from 33.8 per cent to 14.5 per cent, while those that reported being in excellent health increased from 8.1 per cent to 16.1 per cent. The data shows disabled employees perceived themselves to be healthier in comparison with disabled respondents in the 2018 GSS. The 2018 survey found 48.6 per cent reported being in fair/poor health, while just 5.4 per cent believed they were in excellent health. The findings may have reflected SEs employed individuals with less severe disabilities or health conditions. Overall, the data indicates disabled peoples' perception of their health improved since their employment with a SE. Despite these improvements disabled employees continued to smoke after joining a SE organisation. The percentage of regular smokers declined slightly from 22.6 per cent to 16.1 per cent (see Table F 3). This was similar to findings in the 2018 GSS where 19.9 per cent of the disabled population reported to be regular smokers.

Table 6-13 Disabled employees' self-rated health status in comparison with New Zealand's disabled and general population derived from Statistics New Zealand 2008 and 2018 general social survey (%).

	Self-rated health status			
	Fair/poor	Good	Very Good	Excellent
Stats NZ GSS 2008 (Disabled)	33.6	27.1	25.9	13.4
Stats NZ GSS 2008 (General)	14.8	27.7	36.3	21.2
Stats NZ GSS 2018 (Disabled)	48.6	29.7	16.2	5.40
Stats NZ GSS 2018 (General)	14.7	30.0	38.8	16.5
Disabled Employees prior to SE[1]	33.8	30.6	27.4	8.10
Disabled Employees after SE[1]	14.5	35.5	33.9	16.1

[1]Fair/poor categories combined to facilitate comparison with the aggregated 2018 GSS data received from Statistics New Zealand.

Disabled employees recalled finding it difficult to express their identity prior to their employment with a SE (see Table 6-14). The data shows 27.5 per cent found it very hard or hard to express their values, culture and beliefs. This was considerably higher than the disabled and general population in the 2018 GSS, where 6.5 per cent and 1.9 per cent had reported great difficulty with the expression of their identity. This research showed fewer disabled employees reported significant difficulty expressing their identity since joining a SE. Those that reported finding it hard declined from 19.4 per cent to 1.6 per cent. Those that reported finding it very easy increased from 19.4 per cent to 27.4 per cent. In comparison 43.6 of the disabled population in the 2018 GSS reported being in a similar position. Despite disabled employees' reporting greater ease expressing their identity, the findings from this research show some still encountered difficulties expressing their values, culture, and beliefs.

Table 6-14 Disabled employees' ability to express their identity in comparison with New Zealand's disabled and general population derived from Statistics New Zealand 2008 and 2018 general social survey (%).

	Ability to express identity					
	Very hard	Hard	Sometimes easy/hard	Easy	Very Easy	DK/RF[1]
Stats NZ GSS 2008 (Disabled)	1.6	3.6	16.1	41.4	36.2	1.0
Stats NZ GSS 2008 (General)	0.7	2.4	13.5	44.6	37.7	1.1
Stats NZ GSS 2018 (Disabled)[2]	1.7	4.8	17.5	32.0	43.6	-
Stats NZ GSS 2018 (General)	0.4	1.5	14.2	33.5	50.3	-
Disabled Employees prior to SE	8.1	19.4	25.8	24.2	19.4	3.2
Disabled Employees after SE	6.5	1.6	35.5	27.4	27.4	1.6

[1]Don't know and refused category data available with the 2008 GSS CURF microdata but unavailable with the 2018 GSS aggregated data.

The disabled sample group's experiences of discrimination remained largely unchanged after joining a SE. The data showed those that reported discrimination declined from 19.4 to 16.1 per cent. Disabled employees reported being more involved in general elections, with those voting regularly increasing from 59.7 per cent to 71.0 per cent (see Table F 5). This remained lower than the 2018 GSS disabled population where 82.8 per cent indicated they voted. This research found 38.7 per cent recalled having a level of trust between 0-4 prior to working for a SE. In comparison, 14.1 per cent of the 2018 GSS disabled population reported this level of trust, while only 6.0 per cent of the general population indicated similar levels. After joining a SE disabled individuals reported feeling more trusting of their fellow New Zealanders (see Table 6-15). The average level of trust reported by the disabled sample group increased from 5.37 ± 2.56 to 6.68 ± 2.61. Those with high levels of trust in others (9-10) rose from 11.3 to 25.8 per cent, while those reporting trust between 7-8 remained unchanged. This research shows reported trust levels and voting participation amongst the disabled sample group improved after joining a SE.

Table 6-15 Disabled individuals' level of trust in comparison with New Zealand's disabled and general population derived from Statistics New Zealand 2018 general social survey (%).

	Trust in others[1]				
	0-2	3-4	5-6	7-8	9-10
Stats NZ GSS 2018 (Disabled)	4.8	9.3	32.0	40.2	14.1
Stats NZ GSS 2018 (General)	1.9	4.1	28.1	50.8	15.1
Disabled Employees prior to SE	14.5	24.2	27.4	22.6	11.3
Disabled Employees after SE	3.2	11.3	37.1	22.6	25.8

[1]Data unavailable for 2008-12 GSS.

Disabled individuals recalled experiencing high levels of loneliness prior to joining a SE. The data showed 21.0 per cent had felt lonely most or all of the time. This was considerably higher than the 8.3 per cent and 3.5 per cent reported by the disabled and general population in the 2018 GSS. The level of loneliness reported amongst the disabled sample group declined substantially when individuals considered their current situation (see Table 6-16). The research found those that reported higher levels of loneliness declined to 9.7 per cent, while those that reported never feeling lonely increased from 21.0 per cent to 50.0 per cent. These findings aligned with the 2018 and 2008 GSS where 52.9 per cent and 53.5 per cent of the disabled population reported never feeling lonely. This research has shown the disabled sample group reported less social isolation after joining a SE. The data suggests SEs may have offered opportunities for social connection.

Table 6-16 Disabled employees' level of loneliness experienced in comparison with New Zealand's disabled and general population derived from Statistics New Zealand 2008 and 2018 general social survey (%).

	Level of Loneliness				
	None of the time	A little of the time	Some of the time	Most/all of the Time	RF/DK[1]
Stats NZ GSS 2008 (Disabled)	53.5	16.5	19.7	9.4	0.8
Stats NZ GSS 2008 (General)	65.3	17.0	13.1	4.3	0.3
Stats NZ GSS 2018 (Disabled)[2]	52.9	22.1	16.6	8.3	-
Stats NZ GSS 2018 (General)[2]	61.0	22.4	13.1	3.5	-
Disabled Employees prior to SE	21.0	16.1	41.9	21.0	0.0
Disabled Employees after SE	50.0	19.4	21.0	9.7	0.0

[1]Participants refused to answer or didn't know.
[2]Data not available for those who refused to answer or didn't know.

The survey also assessed contact with friends and family and obtaining help in a crisis. It was found the disabled sample group reported more contact with friends when they assessed their current situation (see Table F 9). Disabled employees' that reported having no contact with friends declined from 22.6 per cent to 3.2 per cent, while those that reported daily contact with friends increased from 17.7 per cent to 54.8 per cent. In comparison the 2018 GSS found 12.4 per cent of disabled people reported no contact and 20.0 per cent reported daily contact. The interviews found the disabled sample group reported less contact with families after joining their SE. Reported daily contact declined from 61.3 per cent to 46.8 per cent (refer to Table F 10). This remained higher compared to the disabled and general population. Finally, the interviews found more disabled employees reported having access to help in a crisis after joining a SE. Those that could acquire help increased from 85.5 per cent to 98.4 per cent. The data shows more disabled individuals reported having a support network when they considered their current situation. In some instances, SE organisations may have provided this support role.

The incomes of disabled individuals remained largely unchanged after employment with their respective SEs. Many were participants in the minimum wage exception scheme which allows organisations to pay individuals with disabilities below the normal minimum wage rate. The income brackets used may have been too large to observe any smaller changes to income levels. Despite no changes in income levels, fewer disabled individuals reported not having enough money to meet daily needs. When considering their current situation those that reported earning insufficient income declined from 27.4 per cent to 12.9 per cent (see Table 6-17). In comparison 18.0 per cent of the disabled population in the 2018 GSS reported being in the same position. The interviews showed disabled employees that reported earning enough money increased from 27.4 per cent to 41.9 per cent when they considered their current financial situation. This research shows more disabled employees reported their current income levels better helped them meet their daily needs.

Table 6-17 Disabled employees' perception of income sufficiency in comparison with New Zealand's disabled and general population derived from Statistics New Zealand 2008 and 2018 general social survey (%).

	Income sufficiency				
	Not enough	Only just enough	Enough	More than enough	DK/RF[1]
Stats NZ GSS 2008 (Disabled)	28.2	32.8	30.1	8.60	0.2
Stats NZ GSS 2008 (General)	15.1	33.4	38.3	13.0	0.2
Stats NZ GSS 2018 (Disabled)[2]	18.0	34.6	35.6	12.1	-
Stats NZ GSS 2018 (General)[2]	10.0	27.1	44.4	18.4	-
Disabled Employees prior to SE	27.4	32.3	27.4	12.9	0.0
Disabled Employees after SE	12.9	33.9	41.9	9.70	0.0

[1] Participant refused to answer or didn't know.
[2]Data not available for those who refused to answer or didn't know.

The interviews assessed the housing arrangements of the disabled sample population. The data shows the condition of housing occupied by some employees improved (see Table 6-18). When individuals considered their current living arrangements, fewer reported occupying accommodation that required considerable repairs or maintenance, with the percentage declining from 19.3 per cent to 9.7 per cent. Those who reported living in housing that required no work increased from 40.3 per cent to 48.4 per cent. In comparison 33.1 per cent of the disabled population in the 2018 GSS reported occupying housing in this condition. The interviews revealed modest changes across the other housing wellbeing variables. Disabled employees that reported no issues with housing coldness increased from 41.9 per cent to 51.6 per cent (see Table F 13). In addition, those reported having a minor or major problem with dampness or mould, declined from 38.7 per cent to 27.4 per cent (see Table F 15). The data suggests the current housing occupied by some disabled employees was an improvement on the living arrangements they recalled occupying before joining a SE.

Table 6-18 Condition of housing occupied by disabled employees in comparison with New Zealand's disabled and general population derived from Statistics New Zealand 2018 general social survey (%).

	Condition of housing[1]				
	Immediate extensive repairs/ maintenance	Immediate repairs/ maintenance	Some/minor repairs/ maintenance	No repairs/ maintenance needed	DK/RF[2]
Stats NZ GSS 2018 (Disabled)[1]	7.6	17.2	42.1	33.1	-
Stats NZ GSS 2018 (General)[1]	4.2	14.5	50.8	30.5	-
Disabled Employees prior to SE	11.3	8.1	30.6	40.3	9.7
Disabled Employees after SE	6.5	3.2	33.8	48.4	8.1

[1]Data not available for 2008 GSS CURF due to differing measurement scale.
[2]Data not available for those that refused to answer or didn't know.

Disabled individuals reported receiving further education after joining a SE. The data showed 48.8 per cent of the disabled sample group recalled having no formal or school qualification prior to joining a SE (see Table F 16). This declined to 22.6 per cent when individuals reported on their current situation and the qualifications obtained after joining a SE. Those with a vocational qualification increased from 14.5 per cent to 54.8 per cent. Individuals reported obtaining a variety of qualifications including forklift licenses, food handling certificates, and Ministry for Primary Industries (MPI) biosecurity certificates. Those with tertiary qualifications was unchanged at 1.6 per cent and remained lower compared to the 2018 GSS general and disabled population, where 25.0 per cent and 11.1 per cent reported having a qualification from a university or tertiary institute. The data shows the reported qualifications amongst the disabled sample group increased after joining a SE. The SEs likely provided opportunities to upskill and gain a qualification.

6.5 Assessing the wellbeing of social enterprise employees' using the dashboard from New Zealand's Living Standards Framework

The following section applies the dashboard from New Zealand's Living Standards Framework (LSF) to assess SE employees' wellbeing. This approach provides another presentation of the data collected during the interviews, and the reported experiences of those employed at a SE. The dashboard contains indicators of wellbeing derived from Statistics New Zealand GSS surveys. The survey responses are placed into three categories: low, medium, and high wellbeing. This classification procedure has been described in chapter 5. The dashboard was initially applied to the whole sample

group and New Zealand's general population. It was then applied to the disabled sample group and New Zealand's disabled population. The following section will now describe the key findings.

A large proportion of employees recalled having low wellbeing prior to joining a SE organisation. The dashboard found a higher percentage of the sample group reported a low level of wellbeing across most indicators compared with New Zealand's general population (see Table 6-19). The difference was particularly pronounced across the indicators for overall life satisfaction; contact with friends; expression of identity; voting status; levels of trust; and income sufficiency. It was found that 63.4 per cent of individuals recalled having low wellbeing with respects to their overall satisfaction with life. In comparison, only 18.9 per cent of New Zealand's general population had reported similar subjective wellbeing. The dashboard found 51.7 per cent of the sample group recalled have low wellbeing with respects to the expression of their identity. In comparison, only 16.2 per cent of New Zealand's general population reported this same level of wellbeing.

The dashboard found employees did not recall having high levels of wellbeing before they joined a SE. The results show a smaller percentage of the sample group reported high wellbeing across most indicators compared with New Zealand's general population. The difference was particularly pronounced across the following indicators: expression of identity; levels of loneliness experiences; highest qualifications; and sufficiency of income. It was found that 21.5 per cent of the sample group recalled having high wellbeing with respects to the levels of loneliness experienced. In comparison, 61.0 per cent of the general population had reported the same level of wellbeing. It was found 3.2 per cent of the sample population recalled having obtained tertiary qualifications before joining a SE. In comparison, 25.0 per cent of the general population reported high wellbeing across this indicator of education.

These findings are consistent with results from the earlier summary data tables. The dashboard shows the five SEs were providing employment opportunities to individuals and groups that recalled prior to joining their respective organisation, having lower levels of wellbeing than New Zealand's general population. The dashboard shows employees reported improved levels of wellbeing after joining a SE. The percentage of individuals that reported low wellbeing declined across most of the indicators. Interestingly, despite these improvements a higher percentage of the sample group continued to report low wellbeing across most indicators compared with New Zealand's general population.

The disabled sample group (n = 62) was then assessed using the LSF dashboard (see Table 6-20). A large proportion of disabled employees recalled having low wellbeing prior to joining a SE organisation. This was consistent with findings seen earlier across the entire sample group. The disabled individuals recalled having lower levels of wellbeing across most indicators compared with

New Zealand's disabled population. This was particularly noticeable for subjective wellbeing; trust levels; levels of loneliness; and expression of identity. The disabled sample group were found to report higher wellbeing across some indicators including highest qualification; health status; and contact with family. Individuals recalled being in be better health before and after joining a SE than New Zealand's disabled population. This is consistent with earlier findings (see Table F 2). It is important to note that the disabled population included those with underlying health conditions and severe disabilities. SEs typically employed those with less serious underlying health issues or disabilities.

The dashboard showed the disabled sample group reported improvements across a range of wellbeing indicators after employment with a SE. These trends were similar to those seen in the prior assessment of the total sample group. There was a decline in the percentage of those reporting low wellbeing across all variables, with the exception of contact with family. The dashboard showed 22.6 per cent of the disabled sample group recalled low wellbeing with respects to their contact with friends. After joining a SE only 3.2 per cent reported low wellbeing. It is important to note many disabled individuals continued to report they struggled to express their identify. The dashboard found 44.3 per cent reported a low level of wellbeing. In comparison 24.1 per cent of New Zealand's disabled population expressed the same level of wellbeing.

The application of the LSF dashboard reaffirmed trends that emerged from the summary data tables. Individuals reflected on their current situation and life after joining a SE. The dashboard found fewer employees reported low wellbeing and more reported high wellbeing across a range of indicators. It has shown more employees achieved improved states of wellbeing since joining a SE. It is likely the opportunities to work with a SE was a contributing factor behind some of these reported improvements in wellbeing. The following section will now address the findings from the multiple linear regression models that explored the explanatory factors behind employees' subjective wellbeing.

Table 6-19 Assessing social enterprise employees' wellbeing using the dashboard from New Zealand's Living Standards Framework.

	Before SE			After SE			New Zealand's General Population[1]		
	Low	**Medium**	**High**	**Low**	**Medium**	**High**	**Low**	**Medium**	**High**
Overall life satisfaction	63.4	20.4	16.1	21.5	32.3	46.2	18.9	49.3	31.9
Health status	31.2	24.7	44.1	15.1	31.2	53.8	14.7	30.0	55.3
Smoking status	32.3	-	67.7	26.9	-	73.1	14.8	-	85.2
Expression of Identity	51.7	22.6	17.6	40.0	24.4	35.6	16.2	33.5	50.3
Discrimination	23.9	-	76.1	18.0	-	82.0	17.4	-	82.6
Voting status	45.1	-	54.9	32.6	-	67.4	18.5	-	81.5
Trust levels	33.3	25.8	40.9	11.8	32.3	55.9	5.90	28.1	65.9
Loneliness levels	21.5	57.0	21.5	8.60	44.1	47.3	3.50	35.5	61.0
Family contact	7.50	17.2	75.3	11.8	24.7	63.4	16.5	22.9	60.6
Friends contact	18.3	30.1	51.6	3.20	12.9	83.9	7.00	19.1	73.8
Help in crisis[2]	15.4	-	84.6	3.20	-	96.8	3.70	-	96.0
Highest qualification	39.8	57.0	3.20	19.4	77.4	3.20	44.0	26.8	25.0
Income sufficiency	31.2	29.0	39.8	12.9	32.3	54.8	10.0	27.1	62.8
Annual Income	20.4	70.9	7.50	4.30	88.2	7.50	28.7	35.5	35.6
Housing condition	20.4	21.5	58.1	8.60	25.8	65.6	4.20	14.5	81.3
Housing dampness	10.8	31.2	58.1	4.30	30.1	65.6	3.60	30.5	65.8
Housing coldness	10.8	45.2	44.1	8.60	37.6	53.8	8.20	42.1	45.4

[1]Data obtained from the Statistics New Zealand 2018 GSS.
[2]Variable from 2012 New Zealand General Social Survey.

Table 6-20 Assessing the wellbeing of disabled social enterprise employees' using the dashboard from New Zealand's Living Standards Framework.

	Before SE			After SE			New Zealand's Disabled Population[1]		
	Low	**Medium**	**High**	**Low**	**Medium**	**High**	**Low**	**Medium**	**High**
Overall life satisfaction	66.1	17.7	16.1	21.0	27.4	51.6	35.1	38.8	26.1
Health status	33.9	30.6	35.5	14.5	35.5	50.0	48.6	29.8	21.6
Smoking status	22.6	-	77.4	16.1	-	83.9	19.9	-	80.1
Expression of Identity	55.0	25.0	20.0	44.3	27.9	27.9	24.1	32.0	43.6
Discrimination	20.3	-	75.8	16.9	-	83.1	22.8	-	76.8
Voting status	38.3	-	61.6	27.8	-	72.1	17.2	-	82.8
Trust levels	38.7	27.4	33.8	14.5	37.1	48.4	14.1	32.0	54.3
Loneliness levels	21.0	58.1	21.0	9.70	40.3	50.0	8.30	38.8	52.9
Family contact	6.70	10.2	83.1	10.3	17.2	72.4	14.4	20.3	65.7
Friends contact	22.6	27.4	50.0	3.20	8.00	88.7	12.4	20.3	67.6
Help in crisis[2]	10.2	-	89.8	1.60	-	98.4	5.40	-	93.6
Highest qualification	48.4	50.0	1.60	22.6	75.8	1.60	59.4	25.0	11.1
Income sufficiency	27.4	32.3	40.3	13.1	34.4	54.1	18.0	34.6	47.8
Annual Income	12.9	83.8	3.20	3.20	95.1	1.60	41.2	42.4	16.2
Housing condition	21.4	14.3	64.3	10.5	17.5	71.9	7.60	17.2	75.2
Housing dampness	10.2	30.5	59.3	1.80	28.6	69.6	6.90	27.9	65.2
Housing coldness	8.50	47.5	44.1	8.50	37.2	54.3	12.7	43.3	41.6

[1]Data obtained from the Statistics New Zealand 2018 GSS.
[2]Variable from 2012 New Zealand General Social Survey.

6.6 Exploring the explantory factors behind the subjective wellbeing of social enterprise employees'

The following section explores the explanatory factors behind the sample group's subjective wellbeing. It initially assesses the sample group's recalled subjective wellbeing before they joined their respective SE. It applies multiple linear regression to assess the relationships between overall life satisfaction and the domains of wellbeing. As mentioned in chapter 5, each wellbeing domain has been assigned a corresponding functioning, that is an achieved state of being and/or doing. The first model incorporates seven wellbeing variables. The subsequent model adds socio-demographic variables to further examine the subjective wellbeing of sub-cohorts within the sample group. Attention then turns to assessing the changes in wellbeing reported after joining their SE. A related-sample sign test assesses if the sample group's perceived subjective wellbeing before and after joining a SE was statistically different. Multiple linear regression then explores the changes across the seven wellbeing domains and subjective wellbeing. A subsequent model applies socio-demographic and employment variables. These provide further insight into the explanatory factors behind the changes employees reported in subjective wellbeing.

6.6.1 Assessing the recalled subjective wellbeing of individuals' prior to their employment with a social enterprise

The following section assesses the recalled subjective wellbeing of individuals before they joined their respective SE organisation. Regression models were used to explore the explanatory factors behind their overall satisfaction with life. The results of these are now presented.

The initial regression model included seven independent variables that were entered simultaneously into the regression equation. The resulting outputs were then assessed for linearity, multicollinearity, homoscedasticity, unusual values, independence of observations, and normality. The Durbin-Watson test statistic of 2.265 indicated that the values of the residuals were independent and showed the individuals observations were independent of each other. Partial regression plots did not identify any non-linear relationships between the dependent variable and the independent variables. A scatterplot of the studentized residuals and unstandardised predicted values showed a horizontal band that indicated the relationship between the dependent and independent variables was linear (see Figure G.1 1). The scatter plot was also visually assessed for homoscedasticity. The spread of the residuals exhibited approximate constant spread, while no patterns indicated the presence of heteroscedasticity that would have violated the assumption of homogeneity of variance. The Variance Inflation Factors (VIF) found no variables with a value above 10 that would indicate the presence of multicollinearity. A correlation matrix using the Spearman's Rank-Order Correlation test

found no multicollinearity between the variables (see Table G.1 1). Visual inspection of the histogram with a superimposed normal curve indicated the standardised residuals were approximately normally distributed (see Figure G.1 2). The normal (*p*-*p*) plot indicated normal distribution with the residual points approximately aligned with the diagonal line (see Figure G.1 3). The model was checked for unusual data points (outliers, high leverage points, and influential points). A case-wise diagnostic assessed the standardised residuals for all observations finding two with values more than ±3 standard deviations away from there expected values. The studentised deleted residuals were then assessed finding the same observations had residuals greater than ±3 standard deviations. The raw data was checked for data entry errors to ensure it had been correctly entered. The observations identified also generated high Cook's Distance values which indicated they were influential values. In light of these tests, it was decided the two observations would be removed and the model re-run without them. The assumptions were re-checked meeting the requirements for a regression procedure. Satisfied these had been achieved, attention then turned to assessing and interpreting the results (see Table 6-21).

Table 6-21 Multiple linear regression of individuals recalled overall life satisfaction prior to their employment with a SE organisation.

	B	*95% CI for B*		*SE B*	β	R^2	Δ R^2
		LL	*UL*				
Model[a]	-	-	-	-	-	0.447	0.385
Constant	-1.598	-3.744	0.548	1.079	-	-	-
Education							
No qualifications	-	-	-	-	-	-	-
School qualifications	0.027	-1.010	1.063	0.521	0.005	-	-
Vocational qualifications	0.006	-1.231	1.242	0.622	0.01	-	-
Tertiary qualifications	-2.514†	-5.189	0.160	1.344	-0.166†	-	-
Health	0.595**	0.171	1.019	0.213	0.258**	-	-
Cultural Identity	0.261	-0.184	0.705	0.223	0.114	-	-
Civic Engagement and Governance	0.241*	0.034	0.448	0.104	0.228*	-	-
Social Connectedness	0.381	-0.102	0.865	0.243	0.150	-	-
Jobs and Earnings	0.921**	0.446	1.397	0.239	0.340**	-	-
Housing	-0.015	-0.370	0.340	0.179	-0.008	-	-

Note. Model = "Enter" method in SPSS Statistics; *B* = unstandardised regression coefficient; CI = confidence interval; *LL* = lower limit; *UL* = upper limit; *SE B* = unstandardised regression coefficient; β = standardised coefficient; R^2 = coefficient of determination; Δ R^2 = adjusted R^2.
†$p < 0.10$. *$p < 0.05$. **$p < 0.01$
[a] Wellbeing domains represented by a single indicator. Education = highest qualification; Health = self-reported health status; Cultural identity = ability to be oneself; Social connectedness = level of loneliness; Civic engagement = trust in others; Jobs and earnings = income sufficiency; Housing = condition of housing.

The model produced an adjusted R^2 value of 0.385, which according to Cohen (2013) indicated a moderate effect size. Explanatory independent variables were shown to be statistically significant predictors of subjective wellbeing, F (9, 81) = 32.988, $p < 0.001$. The model identified several statistically significant relationships between overall life satisfaction and the other domains of wellbeing.

The model showed a statistically significant relationship between subjective wellbeing and health (that is 'being in good health' and 'being satisfied with one's life'). A one-unit change in self-rated health levels was associated with a 0.595 increase in subjective wellbeing ($p < 0.01$). The partial regression plot found a positive linear relationship that showed individuals that reported achieving good health were more satisfied overall with their life. The model showed a statistically significant

relationship between subjective wellbeing and civic engagement and governance (that is 'being satisfied with life' and 'able to trust and participate freely in political and civil life'). A one-unit change in the level of trust was associated with a 0.241 increase in subjective wellbeing ($p < 0.05$). The partial regression plot reaffirmed the positive linear relationship between trust and overall life satisfaction. Those that reported or achieved strong trust in others were likely to be more satisfied overall with their life. Finally, there was a statistically significant relationship between subjective wellbeing and jobs and earnings (that is 'being satisfied with life' and 'able to earn sufficient income'). A one-unit change in the income sufficiency variable was associated with a 0.921 increase in subjective wellbeing ($p < 0.01$). Again, the partial regression plot showed a strong positive linear relationship. The model indicates those able to earn sufficient income to meet their daily needs were more satisfied with their life. As outlined earlier nearly half of the sample group reported being unemployed prior to working with a SE, and was likely a contributing factor to those the reported having insufficient income.

This regression model revealed several relationships between the wellbeing domains and their associated functionings (achieved states of being and doing). The findings show the jobs and earnings, health, and civic engagement and governance wellbeing domains were statistically associated with subjective wellbeing. In the context of the CA this meant 'being in good health; being able to trust and participate freely in political/civic society; and being able to earn sufficient income', were associated with 'being satisfied with life'. Employees' that recalled achieving higher wellbeing across these indicators were likely to be more satisfied overall with their lives before they had joined a SE. These findings provide insight on the explanatory factors behind subjective wellbeing. Building on this initial model another regression procedure was run with the inclusion of socio-demographic variables. The following section will address this model.

A standard multiple linear regression procedure was run using 11 explanatory independent variables. The following socio-demographic variables were added: gender, ethnicity, disability status and age. All variables were entered simultaneously into the regression model. It was then checked for independence of observations, linearity, multicollinearity, homoscedasticity, unusual values, and normality. The model produced a Durbin-Watson test statistic of 2.469 indicating no serial correlation (autocorrelation) present, and individual observations were independent of each other. Visual inspection of the partial regression plots found no non-linear relationships that required logarithmic or square root transformation. The collective relationship between the dependent and independent variables was assessed with a scatterplot of the studentized residuals and the unstandardised predicted values. The scatterplot formed a horizontal band indicating the relationship between the dependent and independent variables was linear (see Figure G.2 1). The

scatterplot also found no presence of homoscedasticity. A correlation matrix using the Spearman's Rank-Order Correlation test found no multicollinearity between the variables (see Table G.2 1)

The model was assessed to see if the standardised residuals values were normally distributed. A histogram with a superimposed normal curve was generated and showed the residuals were approximately normally distributed (see in Figure G.2 2). A normal (*p-p)* plot indicated normal distribution with the residual points approximately aligned with the diagonal line indicating the model's normality (see Figure G.2 3). A case-wise diagnostic assessed the standardised residuals for all observations finding two with values more than ±3 standard deviations away from there expected values. The studentised deleted residuals identified the same observations had residuals greater than ±3 standard deviations. The observations generated high Cook's Distance values indicating they were influential values. The model re-run without these observations meeting the assumptions of a regression procedure. The outputs from the model were then assessed (see Table 6-22).

Table 6-22 Multiple linear regression model of individuals recalled overall life satisfaction prior to their employment with a SE organisation.

	B	*95% CI for B*		*SE B*	β	R^2	Δ R^2
		LL	*UL*				
Model[a]	-	-	-	-	-	0.529	0.427
Constant	-2.631*	-5.346	0.083	1.362	-	-	-
Gender	-0.310	-1.316	0.697	0.505		-	-
Ethnicity						-	-
NZ European	-	-	-	-	-	-	-
Māori	0.370	-0.851	1.591	0.613	0.058	-	-
Pasifika	-1.407*	-2.858	-0.045	0.728	-0.170*	-	-
Other	1.753	-0.356	3.863	1.059	0.148	-	-
Age						-	-
15-24	-	-	-	-	-	-	-
25-44	1.441*	0.152	2.731	0.647	0.261*	-	-
45-64	0.561	-0.840	1.962	0.703	0.101	-	-
Disability status	0.621	-0.529	1.772	0.577	0.109	-	-
Education						-	-
No qualifications	-	-	-	-	-	-	-
School qualifications	0.149	-0.954	1.253	0.554	0.027	-	-
Vocational qualifications	-0.247	-1.559	1.065	0.658	-0.038	-	-
Tertiary qualifications	-3.790**	-6.734	-0.845	1.478	-0.25**	-	-
Health	0.727**	0.292	1.161	0.218	0.314**	-	-
Cultural Identity	0.240	-0.206	0.687	0.224	0.105	-	-
Civic Engagement and Governance	0.238*	0.033	0.443	0.103	0.225*	-	-
Social Connectedness	0.394	-0.105	0.894	0.251	0.155	-	-
Jobs and Earnings	0.949**	0.474	1.425	0.239	0.350**	-	-
Housing	0.036	-0.319	0.391	0.178	0.018	-	-

Note. Model = "Enter" method in SPSS Statistics; *B* = unstandardised regression coefficient; CI = confidence interval; *LL* = lower limit; *UL* = upper limit; *SE B* = unstandardised regression coefficient; β = standardised coefficient; R^2 = coefficient of determination; Δ R^2 = adjusted R^2.
†$p < 0.10$. *$p < 0.05$. **$p < 0.01$
[a] Gender = male; Disability status = disabled. Wellbeing domains represented by a single indicator. Education = highest qualification; Health = self-reported health status; Cultural identity = ability to be oneself; Social connectedness = level of loneliness; Civic engagement = trust in others; Jobs and earnings = income sufficiency; Housing = condition of housing.

The inclusion of the socio-demographic variables provided furthur insight on the wellbeing of the sample group prior to their employment at a SE. The adjusted R^2 provided a value of 0.427 which according to Cohen (2013) indicated a moderate effect size. The explanatory variables were shown to be statistically significant predictors of changes in subjective wellbeing, F (16, 74) = 21.959, $p < 0.001$.

The model found several statistically significant relationships between the socio-demographic independent variables and subjective wellbeing. The ethnicity variable was broken down into four dummy variables facilitating the assessment of the different ethnic groups. New Zealand Europeans formed the reference category (n = 56). The regression model identified the overall life satisfaction for individuals of Pasifika descent (n = 11) was 1.407 lower than those of New Zealand European descent ($p < 0.05$). As outlined earlier, the Pasifika segment of the sample population reported on average the lowest subjective wellbeing before working with a SE (refer to Table 6-4). They also reported the largest change in subjective wellbeing after employment with their SE organisation (refer to Table 6-4). The regression model identified the group's subjective wellbeing was lower than their NZ European counterparts before working with a SE. The model also found differences between age groups subjective wellbeing before employment with a SE. The age variable was transformed into dummy variables that facilitated a comparison across age brackets. The reference group was those aged between 18-24 years (n = 19). The model found individuals aged between 25-44 (n = 37) reported a 1.441 higher overall life satisfaction compared with the youngest cohort ($p < 0.05$). Earlier findings showed the youngest cohort had the lowest subjective wellbeing prior to their employment with the SE organisation (see Table 6-4).

The regression models found statistically significant relationships between subjective wellbeing and the health, civic engagement and governance, and jobs and earnings wellbeing domains. A one-unit change in self-rated health was associated with a 0.727 increase in subjective wellbeing ($p < 0.01$). Individuals that perceived they had achieved good health were more satisfied with their life. A one-unit change in the level of trust was associated with a 0.238 increase in subjective wellbeing ($p < 0.05$). Those that reported achieving higher trust in others were more satisfied with their life. A one-unit change in the income sufficiency variable was associated with a 0.949 increase in subjective wellbeing ($p < 0.01$). Members of the sample group that reported earning sufficient income were more satisfied with their life. In the context of the CA this meant 'being in good health; being able to trust and participate freely in political/civic society; and being able to earn sufficient income', were associated with 'being satisfied with life'. These findings are consistent with those observed in the previous regression model. The addition of the socio-demographic variables found some variation between age and ethnic groups. The results from these regression models have provided insight into employees' wellbeing prior to their involvement with a SE. It has provided some insight into the explanatory factors behind employees' subjective wellbeing. The following section seeks to build on

this. It will explore the explanatory factors behind the changes employees reported in their subjective wellbeing after joining a SE.

6.6.2 Assessing changes in subjective wellbeing reported by individuals' after employment with a social enterprise

The following section assesses the changes individuals reported in their subjective wellbeing since working with a SE. It builds on the previous section that provided some insight into their overall satisfaction with life before joining their respective SE organisation. It applies standard multiple linear regression to explore explanatory factors behind the changes in subjective wellbeing. Prior to running the regression procedures, a related sample sign-test was carried out to assess if the differences between the sample group's subjective wellbeing before and after joining a SE organisation was statistically significant.

This study observed many individuals within the sample group reported improvements in their subjective wellbeing after joining a SE (refer to Table 6-5). Improvements were also consistently seen for different socio-demographic groups (refer to Table 6-4). Tests were applied to see if the differences in reported subjective wellbeing were statistically significant. A Wilcoxon signed-rank test was initially considered as it assessed whether there was a median difference between paired observations. The test was the nonparametric equivalent to the pair-sample t-test which was not used as it required a continuous dependent variable. It allowed a dependent variable to be measured at a continuous or ordinal level, and required two related groups (that is individuals before and after they joined a SE). A *Q-Q* plot produced a scatterplot to determine if the data was normally distributed. Some residual deviation from the 45-degree line indicated non-normally distributed data. In addition, Kolmogorov-Smirnov and Shapiro-Wilk Test for Normality confirmed the data was not normally distributed. The data was inspected for potential outliers. The tests were run again with two outlier observations removed, but produced statistically significant results indicating the data was still not normally distributed.

A related sample sign-test was then applied. The test was an alternative to the Wilcoxon signed-rank test when the distribution of differences was not normally distributed. The related sample sign test tested the null hypothesis that the median of the paired differences equalled zero in the population. A histogram was constructed and showed that 68 participants experienced positive changes, 10 experienced negative changes, and 15 experienced no change (see Figure G.3 1). A sign test only assessed individuals that experienced positive or negative changes (Gibbons & Chakraborti, 2020). The test produced a statistically significant result, $p < 0.001$, $z = 6.454$, rejecting the null hypothesis which stated there was no difference between the median of the paired differences in the population. This showed there was a statistically significant median increase in subjective wellbeing

amongst the sample group after employment with their respective SE organisation. The explanatory factors behind changes in overall life satisfaction were then explored using multiple linear regression.

A standard multiple linear regression procedure was run using seven independent wellbeing variables. These represented changes individuals reported across the wellbeing domains (see Table 5-8 for full description). The regression model explored the relationships between the changes individuals reported across these wellbeing domains and changes reported in life satisfaction. The independent variables were all simultaneously entered into the regression model. The Durbin-Watson value of 2.210 indicated residual values were independent and the observations were independent of each other. Partial regression plots were visually inspected and showed linear relationships between the independent variables and the dependent variable. A scatterplot of the unstandardised predicted values and studentized residuals formed a horizontal band which indicated a linear relationship between the dependent and independent variable collectively (see Figure G.4 1). The scatterplot showed constant spread and no patterns were identified indicating heteroscedasticity and the violation of variance homogeneity. The Variance Inflation Factors showed no values below 10 which have indicated the presence of multicollinearity. A correlation matrix using the Spearman's Rank-Order Correlation test found no multicollinearity (see Table G.4 1). The model was checked to see if the residuals were normally distributed. A histogram with a superimposed normal curve was generated and showed the standardised residuals were normally distribution (see Figure G.4 3). A normal *P-P* plot was constructed, and the residual points aligned with the diagonal line indicating the model's normality (see Figure G.4 2). A case-wise diagnostic found two observations whose standardised residual value were more than ±3 standard deviations away from the predicted value. The observations also had high Cook's distance values indicating they influential cases. These cases were removed, and the regression procedure model was re-run without them. The standardised residuals values were assessed again with no values more than ±3 standard deviations away from the predicted value. While no other influential or high leverage values were identified. The model was re-checked for linearity, homoscedasticity, multicollinearity, independence of observations, and normality. Once satisfied, attention turned to interpreting the regression outputs (see Table 6-23).

Table 6-23 Multiple linear regression model of reported changes in employees' wellbeing.

	B	*95% CI for B*		*SE B*	β	R^2	Δ R^2
		LL	*UL*				
Model[a]	-	-	-	-	-	0.372	0.319
Constant	1.961**	1.270	2.652	0.347**	-	-	-
Education	-0.599†	-1.241	0.044	0.323	-0.170†	-	-
Health	0.034	-0.438	0.506	0.237	0.013	-	-
Cultural Identity	-0.384†	-0.805	0.037	0.212	-0.179†	-	-
Civic Engagement and Governance	0.580**	0.356	0.804	0.112	0.533**	-	-
Social Connectedness	0.577*	0.082	1.072	0.249	0.219*	-	-
Jobs and Earnings	0.444*	-0.017	0.906	0.232	0.175*	-	-
Housing	0.094	-0.301	0.488	0.198	0.043	-	-

Note. Model = "Enter" method in SPSS Statistics; *B* = unstandardised regression coefficient; CI = confidence interval; *LL* = lower limit; *UL* = upper limit; *SE B* = unstandardised regression coefficient; β = standardised coefficient; R^2 = coefficient of determination; Δ R^2 = adjusted R^2.
†$p < 0.10$. *$p < 0.05$. **$p < 0.01$
[a] Wellbeing domains represented by a single indicator. Education = qualification attained; Health = change in self-reported health status; Cultural identity = change in ability to be oneself; Social connectedness = change in level of loneliness experienced; Civic engagement = change in trust in others; Jobs and earnings = change in income sufficiency; Housing = change in condition of housing.

The regression model produced an adjusted R^2 value of 0.319 which according to Cohen (2013) indicated a weak to moderate effect size. The explanatory variables were shown to be statistically significant predictors of changes in subjective wellbeing, F (7, 83) = 39.768, $p < 0.001$. The regression model identified several statistically significant relationships between the wellbeing domains. The model found changes reported across wellbeing domains influenced the changes reported in overall life satisfaction.

The regression model identified a positive linear relationship between subjective wellbeing and civic engagement and governance. The model showed a one-unit change in the trust levels was associated with a 0.580 change in overall life satisfaction ($p < 0.01$). Individuals that reported improvements in their trust levels were also likely to more satisfied with their life. The standardised beta coefficient (β) produced a value of 0.533 ($p < 0.01$) was higher than the other explanatory variables, indicating it had a strong effect on reported changes in subjective wellbeing. The model also identified a relationship between subjective wellbeing and social connections. A one-unit change in the level of loneliness was associated with a 0.577 change in subjective wellbeing ($p < 0.05$). Reduced loneliness amongst individuals in the sample group was shown to influence improvements reported in their

overall satisfaction with life. The model showed a relationship between subjective wellbeing and jobs and earnings. A one-unit change in income sufficiency was associated with a 0.444 change in subjective wellbeing ($p < 0.05$). Individuals that reported an improved ability to meet every day needs were shown to influence improvements in their overall satisfaction with life. The employment opportunities afforded through the SE enabled some participants in the sample group to achieve improved functioning states. This regression model shows changes individuals reported across some areas of wellbeing enabled them to be more satisfied with life.

The model found some evidence to suggest there were relationships between subjective wellbeing and both education and cultural identity. These were statistically significant at $p < 0.1$ level but not $p < 0.05$ or 0.01 level. The education variable assessed whether an individual received a qualification(s) while working for their respective SE. The results show those that received a qualification reported a 0.599 smaller change in subjective wellbeing than those did not receive one ($p < 0.1$). This study identified any certificate, course, licences etc received by an individual as a vocational qualification. Some employees gained qualifications in order to work at the SE facilities. For example, obtaining a food handling certificate so they could safely process and package food items. These qualifications may not have meaningfully influenced an individual's subjective wellbeing. In addition, the model also found a one-unit change across the cultural identity variable was associated with a -0.384 change in reported overall satisfaction with life ($p < 0.1$). The data shows being able to express identity more easily was associated with a decline in the change reported in subjective wellbeing.

This regression model has provided insight into the relationships between the wellbeing domains and their associated functionings. It specifically focused on the changes employees reported in their wellbeing after joining a SE. It sought to identify explanatory factors behind the changes in their subjective wellbeing. The findings show changes across the civic engagement and governance, social connectedness, and jobs and earnings wellbeing domains, contributed to the changes employees reported in their overall satisfaction with life. This model has shown individuals that achieved some enhanced functionings states were also able to achieve enhanced subjective wellbeing.

This model was expanded with the inclusion of socio-demographic and employment variables (refer to Table 5-7 for full list). These variables were incorporated to assess other factors behind the changes reported in subjective wellbeing. In total 13 explanatory independent variables were entered simultaneously into the regression procedure. The resulting outputs were then assessed against the assumptions of a multiple regression. A Durbin-Watson statistic of 2.144 indicated the residual values and independent observations were independent. Partial regression plots indicated linearity between the independent variables and the dependent variable. A scatterplot of the studentized residuals and unstandardised predicted values formed a horizontal band that indicated a

linear relationship between the dependent and independent variables (see Figure G.5 1). The spread of the residuals exhibited approximate constant spread, while no patterns indicated the presence of heteroscedasticity that would have violated the assumption of homogeneity of variance. The Variance Inflation Factors (VIFs) and correlation matrix found no presence of multicollinearity between the variables (see Table G.5 1). A histogram with a superimposed normal curve showed the standardised residuals were normally distribution (see Figure G.5 3). The normal P-P plot residual points were approximately aligned with the diagonal line confirming normality (see Figure G.5 2). The model produced was assessed for unusual values. A case-wise diagnostic found two observations whose standardised residual value was more than ±3 standard deviations away from the predicted value. The observations produced high Cook's Distances Values. The model was re-run without these observations, and then reassessed to ensure the model meet the assumptions of a regression procedure.

Table 6-24 Multiple linear regression model of reported changes in employees' wellbeing.

	B	*95% CI for B*		*SE B*	β	R^2	Δ R^2
		LL	*UL*				
Model[a]	-	-	-	-	-	0.518	0.413
Constant	2.667**	1.046	4.308	0.818	-	-	-
Gender	-0.896†	-1.922	0.129	0.701	-0.238†	-	-
Ethnicity						-	-
NZ European	-	-	-	-	-	-	-
Māori	-0.199	-1.418	1.020	0.612	-0.031	-	-
Pasifika	1.901**	0.378	3.425	0.764	0.219**	-	-
Other	1.260	-0.878	3.398	1.073	0.106	-	-
Age						-	-
15-24	-	-	-	-	-	-	-
25-44	-1.352*	-2.619	-0.085	0.636	-0.241*	-	-
45-64	-1.324†	-2.721	0.073	0.701	-0.238†	-	-
Disability status	-0.328	-1.568	0.913	0.622	-0.057	-	-
Employment							
Years worked at SE	0.287*	0.047	0.527	0.121	0.206*		
Prior job	-0.527	-1.563	0.509	0.520	-0.096		
Education	-0.376	-1.002	0.251	0.314	-0.112	-	-
Health	0.111	-0.322	0.544	0.217	0.047	-	-
Cultural Identity	-0.222	-0.627	0.183	0.203	-0.107	-	-
Civic Engagement and Governance	0.500**	0.299	0.701	0.101	0.494**	-	-
Social Connectedness	0.502*	0.011	0.993	0.246	0.192*	-	-
Jobs and Earnings	0.463*	0.042	0.884	0.211	0.193*	-	-
Housing	0.136	-0.223	0.496	0.180	0.067	-	-

Note. Model = "Enter" method in SPSS Statistics; *B* = unstandardised regression coefficient; CI = confidence interval; *LL* = lower limit; *UL* = upper limit; *SE B* = unstandardised regression coefficient; β = standardised coefficient; R^2 = coefficient of determination; Δ R^2 = adjusted R^2.
†$p < 0.10$. *$p < 0.05$. **$p < 0.01$
[a] Gender = male; Disability status = Disabled person. Prior work = worked before SE. Wellbeing domains represented by a single indicator. Education = qualification attained; Health = change in self-reported health status; Cultural identity = change in ability to be oneself; Social connectedness = change in level of loneliness experienced; Civic engagement = change in trust in others; Jobs and earnings = change in income sufficiency; Housing = change in condition of housing.

Once the dataset was shown to meet the assumptions of a standard multiple linear regression procedure, attention then turned to assessing and interpreting the results (see Table 6-24). The adjusted R^2 provided a value of 0.413 which according to Cohen (2013) indicated a moderate effect size. The explanatory variables were shown to be statistically significant predictors of changes in subjective wellbeing, F (16, 76) = 21.144, $p < 0.001$.

The model found statistically significant relationships between the socio-demographic variables and subjective wellbeing. The regression model showed individuals of Pasifika descent (n = 11) reported a change in subjective wellbeing that was 1.901 larger ($p < 0.01$) compared with those of New Zealand European descent (n = 56). This was result was consistent with earlier findings that showed the Pasifika segment of the sample group reported the biggest changes in overall life satisfaction compared to the other ethnic groups (see Table 6-4). The regression model also found males (n = 56) reported a 0.896 smaller change ($p < 0.1$) in life satisfaction compared with females (n = 37). This was also consistent with earlier findings (refer to Table 6-4). The model also identified differences between ages within the sample group. Individuals aged between 25-44 (n = 37) reported a 1.352 smaller change in subjective wellbeing ($p < 0.05$) compared with those aged 18-24 (n = 19). Additionally, individuals aged between 45-65 (n = 37) experienced a change in subjective wellbeing that was 1.324 smaller compared with individuals aged 18-24 ($p < 0.1$). The findings confirm the youngest cohort of the sample group reported the largest change in subjective wellbeing after joining their respective SE (see Table 6-4). The addition of the socio-demographic variables in the model provides some evidence showing different sub-groups within the sample group reported larger changes in subjective wellbeing than others.

The model included two employment independent variables that assessed if prior employment or duration of SE employment influenced changes reported in subjective wellbeing. It was found that a one-unit increase in the years worked at a SE was associated with a 0.287 increase in the subjective wellbeing change reported by employees ($p < 0.05$). The data suggests the duration of employment influenced changes in overall satisfaction with life. Steady employment may have provided a regular source of income, support networks, and social connections.

The regression model found several statistically significant relationships between changes in reported in wellbeing and those reported in overall life satisfaction. A one-unit change in trust levels was associated with a 0.500 change in subjective wellbeing ($p < 0.01$). This was consistent with findings in the previous regression model (see Table 6-23). As outlined earlier the sample group reported low levels of trust in others prior to working with a SE. This improved considerably with the average reported level of trust increasing from 5.57 ± 2.56 to 6.87 ± 2.15 (see Table 6-7). The regression model suggests these changes influenced the changes reported in overall life satisfaction.

The model also found a one-unit change in the level of loneliness was associated with 0.502 increase in the subjective wellbeing change reported by individuals after employment with a SE organisation ($p < 0.05$). These findings were also consistent with the previous regression model. This study found 21.5 percent of the sample group reported suffering from acute loneliness prior to working with a SE (refer to Table 6-8). This declined when individuals reported on their current situation. The employment opportunities likely contributed to this reduction through access to meaningful social connections and support networks. The regression models suggest reduced loneliness was associated with improvements in reported subjective wellbeing. The model also found a one-unit change in income sufficiency was associated with a 0.463 increase in change in reported subjective wellbeing ($p < 0.05$). Once again, these findings were consistent with the previous regression model. This study found 31.2 per cent of the sample group believed they did not have sufficient income to meet their everyday needs (refer to Table 6-9). This declined when the same individuals were asked about their current situation. This regression model shows improved income sufficiency was associated with changes reported in subjective wellbeing.

These regression models have provided some insight into the explanatory factors behind the changes employees reported in their subjective wellbeing. This research found 68 participants reported feeling more satisfied with their life after joining a SE. The changes reported across the civic engagement, social connections, and jobs and earnings wellbeing domains were shown to influence the changes in reported overall life satisfaction. In other words, enhanced functionings were shown to contribute to employees' being more satisfied with life. The findings also show some groups experienced larger changes in subjective wellbeing than others. This is consistent with earlier results. The following section will address the qualitative questions given to participants that finished the interviews.

6.6.3 Social enterprise and wellbeing – employees' perspectives

The following section will address findings from the two open ended questions given to employees at the end of each interview. They were invited to think about life outside their respective organisation and identify the most valued impact(s) the SE organisations had on their wellbeing. The following section will outline the personal experiences of individuals' that were employed with a SE.

The employees' provided some insight into what their lives may have looked like had they not been working with a SE (refer to Appendix H for a full description). The majority addressed their prospective employment opportunities outside the current organisation. Many believed there were few opportunities to gain work and would likely be unemployed. Individuals stated they would be actively searching for employment, however, would very likely end up on some form of government benefit. A variety of reasons were provided that explained the rationale behind the perceived lack of

opportunities. The most frequently cited reasons included: a lack of necessary work experience; lack of education and skills; prior criminal convictions; presence of mental and/or physical disabilities; and past negative experiences trying to find employment. For some individuals the lack of employment opportunities was associated with boredom, depression, feelings of inadequacy, and a loss of confidence. Although many expressed skepticism around employment opportunities, some individuals were more optimistic about working outside the SE in areas including dairy farming, temping, roofing, and forklift driving. There were several individuals regarded these employment opportunities negatively citing they would likely be working in poor conditions and for low wages. Overall, the responses indicated that individuals perceived they had limited employment opportunities outside the SE.

The interviews concluded by asking employees to identify the most valued impact(s) from working at a SE. This question helped to establish connections between the SE organisation and impacts on wellbeing. Employees cited frequently the impact SEs had on their subjective wellbeing. Individuals pointed to increased confidence, enhanced sense of purpose, improved self-esteem, self-worth, and overall satisfaction with their lives. Employees valued the meaningful work, and the stability and direction this afforded them. SE organisations often engaged in community work, and individuals felt a sense of purpose from giving back to their communities and being involved in something bigger than themselves. Collectively these responses support findings presented earlier that show life satisfaction improved for the majority of employees.

Employees valued the impact their SE had on their level of social connectedness. The responses were consistent with results that showed reduced loneliness and more contact with friends amongst the sample group. The organisations provided a site for people to gather and gave individuals opportunities and freedom to reduce social isolation.

> *"One of the biggest impacts on my life is having a lot of friends here that are like me. I don't feel as alone when I'm working here because people are just like me".*

> *"The biggest impact [SE organisation] has had on my life is being with people. It brings comfort. I help fellow employees when they're down. I try my best to help them. It makes me feel happy".*

People valued the opportunities to engage in social activities and develop friendships with other employees and management staff. The social networks extended beyond the SE, and provided them with valued opportunities for meaningful connection outside the workplace. Employees valued the opportunities to connect with those that had experienced or faced similar struggles and challenges.

The interviews found individuals valued the employment opportunities provided by their SE organisation. Employees cited the steady employment provided invaluable job references and experience that would enable them to enter other mainstream work. Those with criminal convictions recalled having struggled to find work as potential employers were reluctant to take them on without references. These individuals highly valued the opportunity to work, as it removed significant obstacles that had restricted their ability to enter mainstream employment.

> *"They [SE organisation] pulled my life back on track. They offered me a job after my visa ran out. Now I can apply for other jobs. Last week I applied for a forklift job which was a big opportunity for me, I wouldn't have had that otherwise".*

> *"The far north has got high unemployment and not many opportunities. Getting a job at [SE organisation] has enabled me to save money. I now have the opportunity to save money, and to move out of [town name] and pursue other employment opportunities [….]".*

Employees valued that employment provided regular income that gave financial security and independence. Individuals valued 'earning their keep' rather than relying on government benefits or subsidies. Some expressed a sense of pride in breaking intergenerational welfare dependence and being able to support their families. The regular income enabled individuals to purchase valued goods and/or services, pay bills and expenses, and save money.

> *"The job has given a lot of security financially. [I] can be more financially independent, and has given me the opportunity to buy food, clothing etc".*

These findings are consistent with earlier quantitative results that showed the sufficiency of income improved for some after employment with a SE organisation.

Individuals' responses concerning the valued impacts on wellbeing typically focused on subjective wellbeing, social connections and jobs and earnings. However, there were also valued impacts in other areas. There were some individuals that noted the SE work environment allowed them to express themselves and open up, and helped them to rebuild trust in their local communities. For other the SE had provided supportive environments that enabled them to develop good eating and exercise patterns which had valued impacts on their health. These responses reveal a diverse array of valued impacts on wellbeing.

6.7 Conclusion

This chapter has presented the key results and findings from the interviews conducted with current SE employees. It assessed the sample group's current wellbeing and their perceived wellbeing before joining a SE. This provided insights on any reported changes in wellbeing. This chapter was a multidimensional assessment of wellbeing, covering eight wellbeing domains and 17 subjective and objective indicators. The sample group reported economic and social exclusion prior to joining a SE, and the results showed high levels of loneliness; little contact with friends; low trust levels in others; dissatisfaction with overall life; and difficulties expressing cultural identity. The sample group often exhibited lower wellbeing compared with New Zealand's general and disabled population, and shows the sample group did not achieve the same level of functionings (states of being and/or doing).

The results show the sample group reported improved wellbeing after joining a SE. Individuals reported being more satisfied with life; more socially connected; and more trusting of others. The findings show employees achieved enhanced states of being and doing. The chapter explored the explanatory factors behind the reported changes in subjective wellbeing. Multiple linear regression found changes across the social connections, jobs and earnings, and civic engagement and governance wellbeing domains, were linked to the changes reported in overall life satisfaction. The regression models also show reported changes in subjective wellbeing varied between socio-demographic groups. This chapter also explored employees' experiences with their SE, and observed many valued the impacts on their wellbeing.

This chapter has provided evidence that shows five employment-focused SEs enhanced many of their employees' wellbeing. They provided jobs to people from marginalised communities. Individuals reported achieving enhanced states of being and doing. These changes suggest the opportunities and freedoms available to individuals expanded after joining a SE. The following chapter examines these findings/claims more closely, and will address the relevant SE and capability literature.

Chapter 7

Discussion

7.1 Introduction

This research has focused on five SEs in New Zealand whose mission centred on employment creation for marginalised people. It aims to create new knowledge on the impact SEs have on the reported wellbeing of their employees. Existing SE literature suggests they can enhance wellbeing through the provision of employment and skills generation that enhances confidence and social connections for individuals, while also providing services and economic opportunities for communities (Munoz et al., 2015). However, there is little evidence underlying these claims, particularly knowledge that goes beyond simple quantification of client numbers. Therefore, the impact on those who come into contact with SE organisations has remained under-researched and prompted some to question if the claims are matched by reality (Munoz et al., 2015; Roy et al., 2014). This chapter brings together the key findings from the interviews and the relevant SE and capability literature. It initially addresses the impact the SE organisations had across the wellbeing domains. This is followed with a discussion of the relationships between these domains and their associated functionings. The chapter then concludes by offering some final thoughts on the impact SE have on wellbeing.

7.2 Social enterprise impact on wellbeing domains and their associated functionings

The following section addresses the impact SE had across the eight wellbeing domains and their corresponding functionings, that is achieved states of being and/or doing. It provides insight on SE employees' reported wellbeing before and after they joined their respective organisation. It contributes to existing literature that has proposed SEs can generate capabilities that can be converted into functionings (Weaver, 2019).

7.2.1 Jobs and earnings - being able to participate and earn sufficient income in the labour market.

This research focuses solely on SEs whose core social mission was providing employment for marginalised communities. SE literature has observed employment-focused SEs seek to address economic exclusion, and frequently work alongside homeless, disabled, and migrant populations (Ferguson, 2013). The organisations enable individuals to participate and earn a regular source of income in the labour market. This research observed individual's income levels and their perceptions

regarding the sufficiency of this income. The following section will address the impact SE had across the jobs and earnings wellbeing domain.

This research supports existing literature showing SEs provide important services in the market economy. The organisations address labour market exclusion through employment opportunities, supplementing efforts and initiatives from the non-profit and public sectors. This research found 46.2 per cent of the sample group had been unemployed prior to joining their respective SE organisation. Some individuals had never been employed, while others had reported long-term unemployment (that is longer than 12 months). The SEs in this study worked alongside individuals with disabilities, former prisoners, at-risk youth, and Māori and Pasifika. These population groups have often been disproportionately represented in New Zealand's unemployment statistics. In 2019, there was a 46.5 per cent difference in the employment rate for the disabled (23.4 per cent) and non-disabled (69.9 per cent) population (Statistics New Zealand, 2019). In 2017, the unemployment rate for Māori was 10.8 per cent compared with the national rate of 4.9 per cent. In 2020, The Ministry of Business, Innovation & Employment (MBIE) observed more Pacifika people were unemployed, and found their unemployment rate increased 7.2 per cent in December 2019 to 9.6 per cent in December 2020 (MBIE, 2020). It has been estimated that approximately 7,700 individuals who leave prison each year remain unemployed, and over 80 per cent of them are on government benefits that last longer than 12 months post release (Cunningham, 2017). Prisoner reintegration had often been hampered by obstacles such as few employment opportunities, substance abuse, poor mental health, lack of accommodation, and low skills (Cunningham, 2017). Employment has been seen as one of the biggest factors in reducing the rates of recidivism. Wiegand et al. (2015) observed many prisoners identified that finding employment as one of their highest post-release priorities.

This study found employment had a modest impact on the annual income levels of some individuals within the sample group. The data showed the employment opportunities improved the financial position of many non-disabled individuals, with their reported annual income bracket increasing from $20,000-30,000 to $30,000-40,000. The income level of those with disabilities did not change after their employment with a SE organisation. This could be attributed to the minimum wage scheme that was introduced by the New Zealand Government. The scheme allows SE organisations to pay below the minimum wage, and means an employee receives a combination of government benefit and earnt wages. This research found some individuals experienced increased income levels; however, this was not enough to change the income bracket of the total sample group, which remained at $20,000-30,000.

These results are consistent with existing literature that suggest some SEs can face constraints that affect their ability to change some dimensions of wellbeing for individuals/groups. Buhariwala et al. (2015, p. 877) outlined social enterprises that employ those with disabilities:

> *"…offer secure, flexible employment, the wages from which can make a difference to monthly income. However, this material difference is often a small one. Most people work part-time, few workers earn above minimum wage, and the nature of the jobs created by enterprise make the prospect of higher wages unlikely".*

It is not intended to diminish the efforts of these organisations, but instead shows recognition to the inherent challenges confronting them (Buhariwala et al., 2015). As outlined in chapter 2, SEs face tensions when balancing a core social mission with commercial revenue gathering activities (Battilana et al., 2015; Smith et al., 2013). Employing people from low-skill and/or educational backgrounds presents significant challenges for the operational efficiency of an organisation. These unique challenges are not generally found in the private sector as they typically hire the most efficient and skilled individuals. SEs respond to these tensions and challenges through compromise and adjustment, for example, through the wage exemption scheme (Amin, 2009; Buhariwala et al., 2015).

A narrow focus on income can neglect the broader and more far-reaching impacts of the employment opportunities. The SE organisations provided accommodating workspaces that gave flexibility, security, support on the job, and support outside the workplace. This was of considerable importance as it made employment work for individuals. The SEs understood the needs and capabilities of their employees. In addition, some people reported being able to purchase valued goods and services (see Appendix H). Some reported they could more easily cover bills and expenses, pay for food, and buy recreational equipment. SE employees provided useful insights on their improved financial position:

> *"[One of the biggest impacts on my life] has been the money earnt. It has helped with day to day living. This has helped to keep car on road, look after the car and buy food".*

> *"The job has given a lot of security financially. [I] can be more financially independent, and have the opportunity to buy food, clothing etc".*

> *"The wages mean that I don't worry about bills and have stopped stressing about them".*

> *"[I've] saved and brought a mountain bike which I couldn't have afforded if I wasn't working here".*

For other beneficiaries the sense of autonomy, freedom, and self-determination was immensely valuable. The steady employment reduced some individual's reliance on government benefits or subsidies, providing a sense of financial independence:

> *"I like to be able to earn money rather than being handed money out".*

> *"Not being on a benefit makes me feel more honest and the kids feel better about themselves. [There is a] sense of pride in earning my keep".*

These findings are also consistent with existing SE literature. Macaulay et al. (2018, p. 215) stated:

> *"…the symbolic act of earning money in return for labour, almost regardless of the amount of the money involved, boosts self-worth and wellbeing of the employees in the social enterprise through the recipient feeling that they are being rewarded for their contribution, regardless of the financial value placed upon that".*

This research identified that SEs provided opportunities to participate in the market economy; however, it was unclear if individuals went on to pursue other mainstream employment. The cross-sectional nature of the study meant it was uncertain what opportunities would be available for the sample group over the long-term. A number of individuals indicated employment had provided opportunities to obtain job references and work experience that improved their future employment prospects in the mainstream market economy. Interestingly, a considerable proportion expressed skepticism on the opportunities available to them outside the context of the SE. This suggested the sample group faced obstacles, either perceived or real, that would prevent them from participating in the market economy. This raised questions about the SEs' ability to transition individuals into other employment. It is uncertain if opportunities for other mainstream employment improved after involvement with a SE. A longitudinal study would likely provide important insights into any potential long-term impacts.

Nearly half of the sample group reported being unemployed prior to their involvement with a SE. The CA asserted unemployment went beyond the loss of income, and was accompanied with a loss of freedom and social exclusion (Sen, 1997). Those stuck in a state of unemployment, even when materially supported by social insurance, did not get to exercise much freedom of decision. This research has shown SEs offer opportunities for marginalised communities to be able participate in the market economy.

7.2.2 Civic engagement and governance - being able to participate freely and trust those in society.

The civic engagement and governance wellbeing domain was concerned with individuals' equity and ability to participate in society. Those treated unfairly in society, or by institutions, are likely to have reduced trust for others or participate in their civic duties (Smith, 2018). This study observed many individuals before joining a SE, reported a level of trust that was considerably lower than New Zealand's general population (see Table 6-7). The determinants of this mistrust were not explored in this research. Economic and social exclusion may have contributed. Economic inequality has been shown to be accompanied with declining trust (Uslaner, 2009). In addition, some research has shown those involved with the criminal justice system often report mistrust for political institutions and others in society (Liem & Weggemans, 2018).

This research found individuals reported a greater level of trust after becoming joining a SE. The percentage of individuals that reported a high level of trust (9-10) increased from 11.8 to 26.9 per cent; while the percentage of individuals that reported low levels of trust (0-4) declined from 33.4 to 11.9 per cent. Beneficiaries provided further insights supporting these findings:

> *"[The biggest impact on my life] is being able to trust people more. I couldn't trust people before working at [SE organisation]. I was a 1 on the trust scale".*

> *"I feel a lot more valued. They have looked after me. I trust them. I have issues trusting people".*

The employment opportunities, positive social connections, and a safe workplace where individuals could express themselves freely are likely to have contributed to the improved levels of trust amongst some of the sample group. An employee articulated this stating:

> *"The biggest impact for me is having the freedom to safely express myself and be myself [as a person with a disability]. They [SE] have given me the opportunity to do things, allowed me to work, and be the best I can be".*

The voting levels amongst the sample group increased after employment with SE. However, these still remained lower compared with the general population in New Zealand. Munoz et al. (2015) suggested that SEs provided spaces that allowed employees to work and socialise. This thesis speculates the SE workplace could have encouraged some voting amongst non-voters, and potentially facilitated the removal of barriers to voting, for example filling out registration papers.

Statistic New Zealand noted the second largest contributor to non-voting was 'perceived barriers' (Statistics New Zealand, 2018).

There is little existing literature that has examined the impact of SE on peoples' level of trust. The findings from this study show SE organisations had a positive impact on the civic engagement and governance wellbeing domain. The data shows some individuals were able to participate more freely in society, and expressed having greater trust in others after working for a SE.

7.2.3 Cultural identity - being able to express identity.

Cultural identity refers to the culture, values, and beliefs systems that are of central importance to an individual, and reflects the degree to which people feel a sense of belonging and inclusion (Smith, 2018). The 2016 Social Report carried out by New Zealand's Ministry of Social Development (MSD) outlined that cultural identity was an important contributor to people's wellbeing. There is currently limited empirical research into the impact SEs have on cultural identity. This study found many employees recalled having considerable difficulty expressing their identity prior to joining a SE organisation. The interviews found 22.6 per cent of the sample group reported it had been 'hard' or 'very hard' to express their identity (see Table E-4). While 27.5 per cent of the disabled cohort reported a high level of difficulty (see Table F-4). In comparison, only 1.9 per cent of New Zealand's general population in the 2018 GSS reported being in the same position. The data suggests these individuals did not have sufficient opportunities or freedom to express their identity prior to employment with the SE. Individuals may have been conforming to others cultural norms or values at the expenses of their own.

The study revealed the sample group still encountered difficulties expressing their identity after employment with a SE. Data showed that 7.6 per cent of individuals reported difficulty expressing their identity after joining the SE (refer to Table E-4). It was recognised that identity was personal and encompassed ethnicity, sexuality, religion, disability, political and cultural beliefs. This study did not explore what aspects of their identity they found difficult to express, or if these barriers existed internally or externally of a SE.

The research found some participants reported it easier to express their identity after joining a SE. The open-ended interview questions revealed some valued the sense of belonging, and working alongside those with similar life stories, experiences, and struggles (see Appendix H). The SE workplace provided a supportive and accepting environment that could have facilitated the expression of personal identity. This is consistent with existing literature that suggests SE can cultivate a sense of belonging amongst their employees (Chui et al., 2019; Kelly et al., 2019; Qian et al., 2019). Qian et al. (2019) believed SEs offered employment that was central to the construction of

a person's identity (values and behaviour), and this could affect their interactions with others. It was reasoned they also facilitated the development of collective identity which was particularly important for groups that experienced stigma or discrimination. The findings from this thesis suggest SE enhanced the opportunities and freedoms of some individuals to express their identity, although it is unclear what aspect of identity individuals found easier to express.

7.2.4 Health - being in good health.

The health domain assessed the physical and mental wellbeing of individuals. The current links between SE and health are primarily conceptual and limited evidence exists on the relationship. This research found the five employment focused SEs had a positive impact on the health of some individuals. Prior to joining their respective SE organisations 31.2 per cent of the sample group recalled themselves being in fair or poor health. This was considerably higher than New Zealand's general population. The lower self-rated health levels could be linked to unemployment. Poor physical and mental health have been shown to be both a predicator and an outcome of unemployment and limited economic participation (Barraket, 2014; Herbig et al., 2013; Mathers & Schofield, 1998; Schmitz, 2011). After employment started with their SE, more individuals reported themselves to be healthier and fewer reported being in fair or poor health. It is suggested the SEs provided opportunities that enabled some individuals to improve their level of health. SE employment required some to be engaged in physically demanding activity, for example, those tasked with devanning 20ft and 40ft shipping containers were required to maintain a high level of fitness to carry out their work. In other cases, individuals walked and/or biked to work which promoted a more active lifestyle. Literature has suggested that SEs can improve the health of beneficiaries. Henderson et al. (2019) for example, argued that SEs improved older individuals access to healthy local food and improved their eating and exercise habits. Tanekenov et al. (2018) outlined that SEs could be linked to improved physical and mental health amongst homeless individuals. Nevertheless, caution is warranted as the subjective nature of the indicator makes it difficult to ascertain if there were objective health improvements within the sample group that could be linked to employment with a SE.

Smoking levels amongst the sample group declined slightly after employment started with the SE. The smoking rates remained higher compared with general population. The data showed Māori and Pasifika employees smoked at a higher rate compared with other ethnic groups. These findings reflected similar trends from the Ministry of Health that found Māori and Pasifika populations were 2.7 times more likely to smoke (Ministry of Health, 2018). The SE organisations may have provided support and accountability structures that enabled some individuals to stop smoking, however, the data suggests the SE impact on smoking habits was limited.

Overall, the data indicates that employment-focused SE enabled some individuals to achieve better levels of health. The findings support general claims within existing literature that believed SE organisations had positive health impacts and outcomes. Qian et al. (2019) for example outlined involvement with SE seems to improve participants self-reported mental and physical health. For those people with mental health conditions, the ability to maintain paid work gave tangible evidence they were able to achieve, which helped counter their negative narrative imposed by themselves and society (Qian et al., 2019). This thesis suggests SEs can provide some individuals with opportunities that enable them to achieve healthier states of being.

7.2.5 Housing - being well sheltered.

The housing wellbeing domain was concerned with the quality of individual's housing arrangements. The findings from this study indicated there were some improvements in the condition of housing occupied by individuals after their employment. Interestingly, one SE organisation was involved practically with the 'Healthy Homes Initiative' and installed insulation in homes around their region. Individuals from this particular SE were beneficiaries of the initiative. Their housing was insulated which reduced the level of coldness and dampness/mould, and improved the overall quality of their housing. The programme was established in recognition that warmer and drier homes resulted in improved health outcomes (Ministry of Health, 2020).

The provision of steady employment and regular income may have enabled some to improve their housing or allowed them to move into better housing arrangements. Existing literature has suggested that SEs can have positive impacts on housing. Rotz et al. (2015) observed that SEs helped workers stabilise their lives. The study found SE workers in stable housing increased from 15 per cent to 53 per cent one year after the job began. It had found individuals had complex living situations, and occupied arrangements ranging from transitional housing, family or friend's homes, emergency shelters, and halfway homes. These findings were consistent with this thesis which found the assessment of housing was complicated, due to a diverse range of living situations amongst the sample group. The accommodation arrangements of many participants were often fluid and changed frequently. Some individuals recalled moving on a weekly or monthly basis. Their transient nature meant the SE had little impact on their housing situation. These participants generally struggled to recall prior housing arrangements making any comparatory assessment difficult. In addition, disabled employees sometimes lived with their family or in supportive accommodation which made it difficult to assess if SE organisations had any impact on their housing arrangements.

The interviews revealed the housing wellbeing domain could also be influenced through external factors. Recent government policies may have played a role in the condition of individuals' housing arrangements. In July 2019, the incumbent Labour government introduced new healthy homes

standards that required all rental homes to meet new specific and minimum standards for insulation, ventilation, moisture ingress and drainage, and draught stopping (Ministry of Housing and Urban Development, 2020). For most property, these new standards needed to be meet by mid-2021. Therefore, some improvements in housing arrangements could potentially be attributed to new policy standards as opposed to employment with the SE.

This research found fewer people reported living in cold and damp housing after joining their SE organisation. In addition, fewer believed they lived in housing that needed significant repairs and maintenance (see Table E-14). The data overall shows some individuals reported living in healthier and better-quality housing after employment with a SE. In some cases, SEs were actively engaged in improving the condition of housing their employees occupied.

7.2.6 Social connectedness - being social connected.

The social connectedness wellbeing domain was concerned with the relationships people had with others. The interviews revealed a complex picture across the indicators used to assess individuals recalled social connections before and after they joined their respective SE organisation.

The interviews showed many individuals across the sample group reported high levels of loneliness before their employment with a SE. These levels of loneliness were considerably higher than New Zealand's general population. Loneliness could be understood:

> *"…as the distressing feeling that accompanied the perception that one's social needs are not being met by the quantity or especially the quality of one's social relationships" (Hawkley & Cacioppo, 2010, p. 218).*

Loneliness left untended has been shown to have serious implications for health, cognition, emotion, and behaviour (Dyal & Valente, 2015). This thesis found that many individuals recalled experiencing acute levels of loneliness, which could be linked to the high unemployment rate. Nearly half the sample group were unemployed prior to working at the SE organisation. Existing research has suggested that unemployment can exacerbate loneliness and have adverse flow-on effects for an individual's mental and physical health (Lindsay, 2010). Weiss (1974) argued that interpersonal relationships were necessary to alleviate social loneliness, and that co-workers provided social networks where individuals shared common interests or activities that could enhance self-worth as their skills and abilities were acknowledged.

The findings from this research show SEs provided opportunities that likely improved the social connectedness of the sample group. The interviews found there was a large decline in the levels of loneliness experienced. The data showed those that felt lonely most or all of the time declined from

21.5 per cent to 8.6 per cent, while those that felt lonely none of the time increased from 21.5 per cent to 46.2 per cent. The interviews also found the frequency of contact with friends increased considerably. The data showed those who had no contact declined from 18.3 per cent to 3.2 per cent, while those that had daily contact increased from 22.6 per cent to 51.6 per cent. This research found that SEs provided opportunities for individuals to develop social networks which offered a source of social, emotional, and practical support.

> *"[I have] developed good social relationships with work colleagues".*

Individuals attached value to these social connections outlining they had alleviated social isolation and provided opportunities to develop a social network of meaningful relationships:

> *"The people at work are my family. At my previous job I was isolated/lonely but at this job I have people who are really supportive of me".*

These networks provided further social interactions outside the SE organisations. Employees outlined during the interviews these were special and valued opportunities that were not available prior to working at the SE:

> *"I've got friends at [SE organisation] and I hang out with them after work".*

> *"[Working] helped me to socialise more at work and outside work".*

> *"The biggest impacts on my life would include hanging out with my mates, meeting new people, meeting my girlfriend. Going out with my friends on work trips to Lawrence, railroad, camps and Queenstown".*

In addition, the research found more individuals had access to help in a crisis after joining their respective organisations. The social networks developed through the SE provided some the support needed during difficult periods. An individual noted during their interview they provided support to other employees if needed:

> *"The biggest impact [SE organisation] has had on my life is being with people. It brings comfort. I help fellow employees when they're down. I try my best to help them. It makes me feel happy".*

These findings are consistent with earlier research that suggests SE interventions have positive impact on individuals' social connectedness (Barraket, 2014; Evans, 2007; Kelly et al., 2019; Teasdale, 2010a). In addition, the findings support literature that suggest SE organisations can address the social exclusion experienced by some people (Evans, 2007; Lloyd, 2002; Teasdale, 2010a). Teasdale

(2010a) suggested SEs enabled individuals to realise some dimensions of social connectedness within the setting of the organisation. Kelly et al. (2019) found SE provided people with increased reason and motivation to seek social interactions, and provided increased opportunities to meet and interact with people. It was believed these improved social bonds and meaningful relationships and provided a sense of belonging and social inclusion.

Interestingly, the data from the research revealed modest declines in the contact the sample group had with their families. The decline could primarily be attributed to the disabled group within the sample group where results showed that daily contact with family declined from 61.3 per cent to 46.8 per cent. It is believed that employment may have provided individuals with opportunities to connect with other social circles that reduced their reliance on families as a source of support and social connection. Despite the decline, the percentage of individuals that saw family everyday remained higher than New Zealand's disabled and general population. This reflects that some individuals, particularly those with disabilities, continued to live with their families.

The findings from this study indicated that SEs enabled a large proportion of the sample group to achieve increased levels of social connectedness. The findings show the organisations addressed social exclusion amongst these marginalised communities. The SEs facilitated the development of meaningful social networks that were valued by their employees. The social connections provided individuals with a sense of belonging, and were reinforced through social support networks, emotional and practical support. Overall, the findings are broadly consistent with previous research that found SEs can address social isolation and exclusion through improved social connectedness.

7.2.7 Knowledge and skills - being educated.

The knowledge and skills wellbeing domain sought to capture educational attainment. Education equipped individuals with the knowledge, skills, competencies and experiences that were needed to succeed and lead a life they valued. The study found over half of the sample group had left school early. It was also found that 39.8 per cent reported no form of qualification prior to working with their respective SE organisation. The data indicated many individuals had experienced limited opportunities for attaining an education. The sample group consisted of groups such as former prisoners who often had lower education outcomes compared with New Zealand's general population.

This research found that SE organisations provided opportunities for some individuals to pursue further education. These findings are consistent with some existing literature, for example, Teasdale (2010b) found SEs had provided homeless people with opportunities to gain qualifications. This thesis found the percentage of people without any formal qualification declined to 19.4 per cent,

while those with vocational qualifications increased from 21.5 per cent to 57.0 per cent. Participants reported gaining qualifications such as forklift licenses, food handling and biosecurity certifications, and NZQA literacy/numeracy courses:

> *"[The biggest impact on my life has been] them [SE organisation] giving me a forklift licence".*

> *"Last week I applied for a forklift job which was a big opportunity for me, I wouldn't have had that otherwise".*

The SEs also afforded several individuals the opportunity to obtain a driver's licence. The licence enabled individuals to carry out their job, get to work independently, and enhanced their social connectivity. A report for the New Zealand Ministry of Social Development assessed the effectiveness of driver's license programmes and suggested that individuals that obtained a licence spent more time in employment and earnt more (Ministry of Social Development, 2018). Overall, the research found the sample group obtained a broad range of vocational qualifications. A number of these qualifications were required for individuals to be able to work at their SE. In some cases, the organisations enabled individuals to advance their education and gain qualifications they had been unable to obtain at school. The SEs did not appear to facilitate opportunities for more advanced education, and only a handful of individuals had obtained tertiary qualifications.

This research found SEs enabled some of the sample group to obtain qualifications. In some cases, SEs provided tailored courses and brought in external facilitators which allowed disabled individuals to be receive an education.

> *"[The biggest impact on my life has been] the education opportunities. They [SE organisation] understand people with disabilities. I've been able to start a course. The teachers are understanding of my disability".*

The interviews found traditional schooling had often moved too quickly for them and they were left behind. The vocational qualifications enabled some individuals to work and participate in the market economy. This study found individuals valued these opportunities to further their education, but did not assess if they enhanced their capabilities (opportunities and freedoms) to pursue other employment avenues. Overall, the findings from this research supports existing literature that suggest SEs can enhance the skills, qualifications, and practical job competencies of beneficiaries.

7.2.8 Subjective wellbeing - being satisfied with life.

The subjective wellbeing domain assessed individuals perceived quality of life. A single ordinal measure looked at employees' overall satisfaction with their lives. Life satisfaction referred to a summary appraisal of the quality of one's life regardless of how it was achieved (Pavot & Diener, 2009) It has often been considered a useful proxy for an individual's overall wellbeing as it takes into consideration experiences across all the domains of wellbeing (Ormsby, 2018; Smith, 2018).

This study found that employment with a SE had a significant impact on the sample groups self-reported overall life satisfaction. When assessed across socio-demographic variables such as age, gender, ethnicity and disability status, the data showed all groups experienced an improvement in their subjective wellbeing (refer to Table 6-4). Those that reported low life satisfaction declined from 63.4 per cent to 21.6 per cent, while those reporting a high life satisfaction increased from 16.2 per cent to 46.3 per cent. The interviews observed individuals valued the increased sense of purpose, confidence, and improved their overall satisfaction with life. Several participants provided insights through their responses to the open-ended questions:

> *"The biggest impact on my life] is having a sense of purpose. I have a reason to get out of bed. I have something to look forward to when I wake up".*

> *"[The biggest impact on my life has been] getting a sense of worth and improved self-esteem. [The job] snapped me out of depression and anxiety".*

The findings supported previous studies that showed SE interventions and their activities can have a positive impact on individuals subjective wellbeing (Ferguson, 2012, 2013; Ferguson & Islam, 2008; Macaulay et al., 2018). Ferguson and Xie (2008) for example, found in their study that a SE intervention improved the life satisfaction of homeless youth. Qian et al. (2019) also believed SEs had a positive impact on beneficiary's subjective wellbeing.

Although many individuals reported improved life satisfaction, this research also recognises the potential for survivor bias, a form of selection bias. Concentrating on current SE employees meant the selection process did not consider those who had left the organisation. It is possible some of these may not have enjoyed their experience. In addition, it is possible employees' memories exaggerated feelings of their subjective wellbeing before they joined a SE. Colombo et al. (2020) outlined inaccuracies often arise when recalling past experiences, a form of recall bias. It was stated:

> *"…the emotions experienced during an event do not necessarily match with the emotions prompted by the associated memory: The intense sadness experienced after losing a job, for instance, might be remembered less*

intensely […] or more intensely […] sometime later" (Colombo et al., 2020, p. 907).

Skowronski (2011) explored recall biases in autobiographical memory. It observed two phenomena: positivity bias which was the tendency to see the past more positively than it actually was; and fading affect bias (FAB), which reflected the tendency for positive memories to retain their emotional power over longer time periods than negative memories.

The findings from this study also found individuals' interactions and experiences with SE organisations were often complex and heterogenous. The research found a portion of the sample group experienced no change (*n* = 15) or a decline (*n* = 10) in their subjective wellbeing. This was a large proportion of SE employees and conflicted with broader statements of positive impact. Munoz et al. (2015) argued it is important to evaluate SEs contributions to wellbeing, and interrogate assumptions they are always rewarding and empowering. There is little existing literature that has explored these neutral/negative experiences. Cooney (2011) suggested some SE organisations could undermine subjective wellbeing when they offered high risk or low-quality work to individuals already experiencing high levels of disadvantage. Tanekenov et al. (2018) found those that interacted with SEs often expressed dissatisfaction with the limited training, lack of work experience, and few employment opportunities outside their organisation. This is consistent with some of the findings in this thesis research. The open-ended interviews questions prompted employees to think about life outside their SE. As outlined earlier, individuals often perceived there to be few other employment opportunities available to them. This may have been a contributing factor behind some individuals reported overall life satisfaction. The findings show interactions with a SE are not always necessarily positive experiences for individuals.

7.3 Social enterprise employees wellbeing and relationships between the achieved functioning states

This section explores the relationships between the wellbeing domains and their corresponding functionings. These relationships are assessed on the understanding that capabilities, functionings, resources, and conversion factors are interrelated and connected to each other (Binder & Coad, 2011). As outlined in chapter 4 the CA has been applied in a SE context. Recent publications have explored the reconceptualising of SE social value. Weaver (2019) for example, argued that social value be conceptualised around the CA, and believed social capabilities and social functionings could be fostered through a SE. This section seeks to build on these existing foundations of SE literature (Tanekenov et al., 2018; Weaver, 2018, 2019). It looks to create new knowledge by examining the relationships between the achieved functionings of SE employees. This study has specifically examined the explanatory factors being the functioning 'being satisfied with life'. These self-reports

of life satisfaction provide valid measures of wellbeing, and a cognitive reflection of how individuals perceive their lives are going (Brown et al., 2012).

This thesis initially explored the explanatory factors behind employees' reported life satisfaction before they joined their respective SE organisation. The study observed subjective wellbeing varied between socio-demographic groups. It was found Pasifika participants reported lower life satisfaction than those of New Zealand European descent (see Table 6-22). As outlined earlier this was consistent with earlier results showing these individuals had reported the lowest average life satisfaction of the ethnic groups (see Table 6-4). The findings are consistent with existing national studies. Brown et al. (2012) examined the determinants of self-assessed life satisfaction in New Zealand using data from the 2008 NZGSS. Pacific peoples were found to be less satisfied with life than New Zealand Europeans. Jia and Smith (2016) using data from the 2008, 2010 and 2012 NZGSS, also found Pacific People reported lower life satisfaction than New Zealand Europeans. It was also observed that younger members of the sample group recalled feeling less satisfied with their lives than older cohorts. This confirmed earlier summary data that showed younger individuals reported lower life satisfaction than older cohorts (see Table 6-4). Jia and Smith (2016) outlined studies have often found life satisfaction is highest amongst younger and older age groups, forming a distinct 'U-shaped' profile (Brown et al., 2012). This thesis did not explore these sub-groups specifically, and it is unclear why the younger cohort and Pacifika ethnic group reported lower life satisfaction. However, the findings do show that some groups can enter employment with SEs with varying life satisfaction.

This research found individuals that joined a SE in good health were more likely to have a higher overall life satisfaction. The study identified a relationship between the functionings 'being in good health' and 'being satisfied with life'. Existing literature outside the context of SE has found links between the health status of an individual and their subjective wellbeing. Kööts–Ausmees and Realo (2015) reported a positive relationship between self-reported health status and life satisfaction; while Ngamaba et al. (2017) conducted a broad systematic literature review, and concluded there was a moderately positive relationship between health status and overall life satisfaction. In addition, the study found a relationship between the functionings 'being able to trust and participate freely in society' and 'being satisfied with life'. Those that reported higher levels of trust were likely to be satisfied overall with their life. Again, these findings are consistent with existing literature that has found links between trust and subjective wellbeing (Bai et al., 2019; Churchill & Mishra, 2017; Jovanović, 2016; Usher, 2007; Yamamura et al., 2015). Yamamura et al. (2015) for example, outlined there was a well-established positive relationship between trust and subjective wellbeing. Jovanović (2016) found interpersonal trust was a robust predictor of individual's subjective wellbeing. It was reasoned that trust fostered cooperation and helped maintain close relationships between individuals. The research also identified a relationship between the functionings 'able to earn

sufficient income' and 'being satisfied with life'. Individuals that reported having sufficient income to meet daily needs were likely to be more satisfied with their life. The self-reported income sufficiency could be understood as individual's personal assessment of their economic position (Cialani & Mortazavi, 2020). These findings are consistent with existing literature that has suggested perceived income adequacy could play an important role in subjective wellbeing. Ferrer-i-Carbonell (2005, pp. 998-999) argued:

> *"…individual well-being does not only depend on income in absolute terms, but also on the subjective perception of whether one's income is adequate to satisfy one's needs".*

Pereira and Coelho (2013) later observed perceived income adequacy had a strong positive impact on subjective wellbeing. It was found financial issues were often amongst individuals' top worries, thus constituting a major concern that could affect individuals' wellbeing.

The health, civic engagement and governance, and jobs and earnings wellbeing domains were shown to be significant predictors of individuals subjective wellbeing before employment with a SE. The existing literature has provided some evidence to support these relationships. The findings from this thesis provides useful insight into the determinants of life satisfaction before employees joined their respective SE organisations. This research then extended this analysis and explored the explanatory factors behind reported changes in employees' life satisfaction after joining a SE. This will now be discussed.

Recent literature has applied the CA around the reconceptualisation of SE social value. The terms 'social capabilities' and 'social functionings' have emerged to emphasise that SEs aim to foster human capabilities (Weaver, 2019). The existing research argues the organisations may enhance individuals' capabilities and functionings, but few empirical studies have tested this. In addition, few studies have explored the changes individuals report across functionings, or relationships between these achieved functionings. This thesis generates new knowledge on the impact SEs have on people's wellbeing by exploring the explanatory factors behind the reported changes in employees' subjective wellbeing.

This research encompassed organisations that provided a variety of opportunities to participate in the market economy. The firms differed in size, industry focus, and maturity. The nature and duration of support and employment given to employees differed considerably. Some focused on the provision of stable long-term jobs, while others acted as a springboard for entry into other mainstream employment. This study found the duration of employment influenced the reported changes in subjective wellbeing. The positive linear relationship showed as the length of employment

increased, so did the reported change in overall life satisfaction. These findings are consistent with some existing research that suggests the duration of engagement with an employment-focused SE may influence better outcomes. Rotz et al. (2015) found the duration of SE employment was associated increased housing stability and improved mental health. Qian et al. (2019) found those with significant barriers to work could require 9-12 months to develop the work and social skills needed for future employment. It was believed that longer employment SE programmes enabled stronger trust to develop between employers and employees. This thesis has shown the duration of employment may also influence the changes employees' report across their subjective wellbeing.

This research also found differences between the socio-demographic groups. The youngest members of the sample group reported the largest changes in subjective wellbeing. They reported larger changes than the older cohorts (25-44 and 45-64). These changes meant that younger participants on average reported a higher satisfaction than older participants (see Table 6-4). As reported earlier, life satisfaction on average is highest for younger and older groups (Brown et al., 2012). This thesis did not examine why younger individuals reported larger changes in subjective wellbeing. It is suggested that for young people moving into the workforce is a key milestone, that marks a transition into adulthood and marks the ability to be finally independent (Qian et al., 2019). Existing SE literature has shown the firms can enhance the subjective wellbeing of young people (Ferguson, 2012, 2013). Ferguson (2013) found SE interventions (SEI) improved the wellbeing of homeless youth (aged 18-24) with mental illness. Life satisfaction measures showed the SEI programme had a 6.45 unit increase in total life satisfaction, compared with a 2.25 unit decrease in the control group (p = 0.02). This thesis has also shown young people in the sample group reported higher life satisfaction after joining a SE. In addition, they also reported the largest changes in life satisfaction, and were on average more satisfied with their lives than older employees. Those of Pasifika descent reported larger changes in subjective wellbeing than New Zealand Europeans. As mentioned earlier, Pasifika participants in the sample group recalled having the lowest average subjective wellbeing (see Table 6-4). This was consistent with existing research that has examined life satisfaction in New Zealand (Brown et al., 2012; Jia & Smith, 2016). In addition, this study also found Pasifika participants reported larger changes in life satisfaction than New Zealand European, Māori and other ethnic groups.

It has been well established SEs often employ individuals from marginalised communities (Maxwell & Rotz, 2017; Tanekenov et al., 2018; Weaver, 2016). Employment provides opportunities to participate and generate income in the market economy. Weaver (2019) argued that SEs offer employment opportunities and could improve peoples' economic self-sufficiency, that is their social functionings. This study has expanded on this line of thinking and examined changes reported across functionings. It observed a relationship between the functionings 'being able to participate and earn sufficient income' and 'being satisfied with life'. Improvements reported in income sufficiency or

ability to meet daily needs, corresponded with improvements reported in overall life satisfaction. This study found employees could purchase valued goods and services, reduce their debts levels, and increase their savings (refer to Appendix H). This likely alleviated stress and enhanced the ability of some to provide for their families. These findings are consistent with some existing literature which has shown the SE firms can enhance subjective wellbeing (Ferguson, 2012, 2013), income levels and self-assessed income sufficiency (Qian et al., 2019). Employment-focused SEs bring the most direct and immediate returns for employees through wages and salaries (Leung et al., 2019). Access to economic capital can enable people to participant more in society, improve material wellbeing, and improve access to resources during challenging or uncertain periods (Qian et al., 2019). This thesis has also shown that an improved ability to meet daily needs is linked with improvements in subjective wellbeing.

This research found SE organisations provided opportunities for individuals to expand their social network and develop meaningful social connections. It also observed a relationship between the functionings 'being socially connected' and 'being satisfied with life'. Employees' that reported reduced levels of loneliness after joining a SE were more satisfied with their life. In other words, increased social connectedness was associated with improved subjective wellbeing. Social connectedness is an essential part of human life and an important contributing factor to an individual's wellbeing. Most people are wired to be socially connected, and are social beings that strive to connect and form bonds with each other. Studies have shown that SEs can address social isolation and exclusion (Barraket, 2014; Kelly et al., 2019; Teasdale, 2010a). Yet, there are few which have explored the relationship between subjective wellbeing and social connections in a SE context. More broadly speaking, existing literature has shown social connections are positively associated with subjective wellbeing (Brown et al., 2012; Jia & Smith, 2016). Diener and Seligman (2002) for example, concluded good social relationships were necessary for subjective wellbeing. Hombrados-Mendieta et al. (2013) argued the loss or scarcity of social relationships could lead individuals to experience loneliness. In comparison, this thesis has shown the five SEs provided opportunities for social connections that reduced perceived loneliness amongst the sample group. This was found to be associated with improvements in the overall life satisfaction reported by employees.

This research found individuals reported higher levels of trust in others after joining their respective SE organisation. It also observed a relationship between the functionings 'being able to participate freely and trust those in society' and 'being satisfied with life'. It was found that increased levels of trust amongst the sample group were associated with improvements reported in overall life satisfaction. The SEs may have provided a work environment that nurtured relationships which enhanced trust between individuals. In addition, positive interactions that treated individuals' fairly and respectfully may have also contributed to increased levels of trust (Alesina & La Ferrara, 2002).

Few studies have examined the relationship between trust and subjective wellbeing within the context of SE. More broadly, existing literature has shown trust has a positive association with subjective wellbeing both cross-sectionally and longitudinally (Churchill & Mishra, 2017; Helliwell et al., 2016). Helliwell and Wang (2010) found evidence that linked trust and subjective wellbeing based on data from the Gallup World Poll and the Canadian General Social Survey. The study found individuals with higher trust levels experienced 18 per cent higher satisfaction with life. Brown et al. (2012) also outlined trust in others was a strong predictor of life satisfaction. This thesis has also shown the five SEs provided opportunities that improved trust amongst the same group. This was also found to be associated with improvements in subjective wellbeing reported by employees.

This study found some wellbeing domains did not exhibit statistically significant relationships with reported changes in subjective wellbeing. The housing and health domains both displayed positive correlation coefficients but were not significant. The data suggests these did not influence reported changes in employees' life satisfaction. The absence of a significant linear relationship does not mean employees' life satisfaction was not affected by changes across these wellbeing domains. In addition, the findings have not precluded the possibility of changes in self-rated health status or housing condition being associated with changes in subjective wellbeing.

This thesis has provided some insight into the relationships between functionings. These represented individuals' achieved states of being and/or doing. The sample group reported improvements across several functionings that were associated with changes in reported subjective wellbeing. These relationships have been observed in wider academic literature, but few studies have observed these within a SE context. The changes in functionings likely reflect underlying changes in peoples' capabilities. Although these were not directly assessed or measured, it is proposed the SEs enhanced the opportunities and freedoms available to people to lead lives they value and have reason to value. These capabilities enabled people to enhance their wellbeing and achieve improved states of being and/or doing.

7.4 Social enterprises - organisations that enhance wellbeing?

In recent decades, SEs have been promoted as a mechanism that can move people out of disadvantage, address poverty and mitigate social exclusion (Roy, 2021). This thesis has looked at the impact five employment-focused SEs organisations have on the wellbeing of people from marginalised communities in New Zealand. These firms were observed creating spaces and conditions that enabled individuals to participate and contribute to the market economy which is consistent with existing literature (see Lysaght et al., 2018; Weaver, 2022). Recent literature has also suggested SE organisations can offer goods and services that may expand the capabilities of

individuals (see Weaver, 2018; 2020). This study builds on this by capturing the perspectives of SE beneficiaries to assess if these goods and services expanded their capabilities to achieve enhanced wellbeing states of being and/or doing. Their views and perspectives provide important insights on SE social value creation (Lorenzo-Afable, 2020). This chapter has so far explored the impact SE had across eight domains of wellbeing and the relationships between the associated functionings. This following section will provide some final points of discussion on the impact SEs have on wellbeing.

This research focused on five SEs whose social mission was the provision of employment opportunities. The findings from the study confirmed the organisations employed those from marginalised communities that reported strong economic and social exclusion. The LSF dashboard showed a lower percentage of the sample group reported 'high wellbeing' across most indicators compared with New Zealand's general and disabled population (see Table 6-19). In particular, overall life satisfaction, expression of identity, levels of loneliness, and trust in others. These findings were also consistent for the disabled cohort of the sample group (see Table 6-20). The findings show the SEs offered important employment opportunities for vulnerable segments of New Zealand society that reported to have low levels of wellbeing. The data shows individuals did not often achieve valued states of being and/or doing prior to joining a SE. It can be inferred they lacked capabilities or sufficient opportunities and freedoms to lead lives they valued and had reason to value.

This study has provided evidence on the impact SE activities have on the wellbeing of people. Employees reported improved wellbeing after joining their respective SE organisation. The sample group and the disabled cohort showed broad improvements across the wellbeing domains. The organisations provided employment for a sample group where 46.2 per cent reported not having a job beforehand. Employees reported improved wellbeing across the subjective wellbeing, job and earnings, social connections, and civic engagement and governance wellbeing domains. The SEs provided flexible and accommodating work environments for their employees'. They provided opportunities for individuals to achieve enhanced states of being and/or doing. The findings from this research are consistent with existing literature that has found SEs can deliver positive wellbeing outcomes (Ferguson, 2012, 2013; Roy et al., 2014, 2021).

In addition, this research addresses some uncertainty regarding the impact and outcomes of SE activities. Academics, policy makers and SE practitioners have called for more studies that would provide greater clarity and insight. Roy et al. (2014) believed more evidence was needed to gain better understanding of SE outcomes. Teasdale (2010a) outlined much of the literature was conceptual rather than based on empirical evidence, and it was argued there was little evidence to support broader claims of SE impact. Munoz et al. (2015) claimed there was sparse evidence underlying claims of impact on wellbeing. It was reasoned it was important to evaluate their

contribution to wellbeing and assess if interactions were always rewarding and empowering. New Zealand's Social Enterprise Development Programme was established to make it clear how the sector was contributing to the government's economic, social and environmental goals. This thesis has shown employment-focused SEs provide valuable services for marginalised members of local communities around New Zealand.

Individuals were also seen to have diverse interactions with their SE organisations and reported a variety of changes across the wellbeing domains. This study suggests caution should be exercised when making broader claims regarding the impact of SEs on wellbeing. It is reasoned broad claims can obscure the complexity and nuances associated with individuals' personal experiences. As outlined earlier in the chapter, the sample group reported feeling more satisfied overall with their lives after joining a SE organisation. The results of the related sample sign-test confirmed a statistically significant difference. Taken at face value it would seem SEs had a positive impact on subjective wellbeing. Yet, it was also found that 25 individuals reported no change or a decline in life satisfaction. This research has shown individuals' interactions with a SE should not be assumed to always enhance their wellbeing. These conclusions are consistent with some existing SE studies (see Tanekenov et al., 2018).

This research also suggests scholars and practitioners need to be realistic about the ability of SEs to impact the wellbeing of individuals from groups that face significant barriers to the labour market. The sample group continued to report instances of discrimination and difficulties expressing their cultural identity. This study did not explore where these challenges were encountered, but it is likely some experienced discriminatory acts and faced barriers to expressing their identity outside the physical domain of the SE. Existing literature has posited SEs cannot be expected to change the external environment or address systemic societal problems. Toner et al. (2008) argued SEs were unable to tackle the underlying structural conditions that shaped deprivation and exclusion stating:

> *"… it was neither obvious nor proven that SEs can live up to the promise of empowering communities; communities are too complex, too stratified and too dynamic" (Toner et al., 2008, p. 11).*

Tanekenov et al. (2018, p. 152) echoed a similar position and urged:

> *"…caution against any automatic presumption regarding the empowering benefits of SEs for disadvantaged groups and gives pause to the enthusiasm with which specialist SEs are often embraced across the political spectrum".*

This study provides some evidence that supports these conclusions, and argues it is important to be realistic about the impact employment-focused SEs can have on wellbeing of people.

Conversations with management revealed further insights into SE organisations contributions and their efforts to enhance employees' wellbeing. The staff expressed a strong desire to serve their employees and invested considerable time and energy, providing formal and informal support, and giving them access to a range of additional services. It often went far beyond the support and resources provided or expected from traditional mainstream employment. It required specialist staff as well as strong internal communication procedures. In addition, conversations and indirect observations revealed the SEs adopted a people-centred management approach, and actively tried to involve their employees in decisions related to the organisation.

The SEs often provided personalised support for their employees and demonstrated an ability to adapt and respond flexibly to the needs of different individuals. The SEs provided much-needed structure for many of their employees'. One interviewee noted:

> *"I have a routine [and] something to work on to keep me occupied."*

These regular time commitments stemming from employment have been linked to improved health outcomes and provide opportunities to transition out of potentially negative environments (Qian et al., 2019). However, the SE organisations also showed an ability to be flexible with these time structures, which has been shown to be particularly beneficial for people experiencing disadvantage arising from challenges e.g., social isolation, health problems, and is vital for their sustained participation in the workplace (Qian et al., 2019). The SEs revealed a strong awareness of these barriers and challenges confronting their employees' and provided considerable flexibility e.g., through part-time working hours. This was noted by employees during the interviews, for example, an individual stated:

> *"Working at the social enterprise is flexible which has enabled me to continue to work despite declining health. I have MS [multiple sclerosis] and I can call in and take the day off if I'm not it [feeling well]. I don't think I could do this in other workplaces. I don't think there are many opportunities [to work] outside [SE]."*

Existing literature suggests SEs can provide distinctive employment opportunities. Akingbola et al. (2015) suggested SE provided their employees a chance to overcome systemic barriers that makes it difficult to enter mainstream jobs. It observed a SEs human resource policy did not require its

employees to provide notes for absences which helped those suffering from long-term mental and physical health problems (Akingbola et at., 2015).

The SE organisations worked closely with employees' particularly those that struggled adapting to/holding onto a job. The management expressed a willingness to journey alongside individuals, taking into consideration their personal circumstances. SE management outlined some beneficiaries lives at times could be complicated and required greater flexibility and understanding on their part. For example, some individuals lacked budgeting skills which meant at times they could not afford a bus fare/petrol to get to work. The SE management responded with additional financial support, but also sought to improve their financial literacy so this could be avoided in the future. In other cases, long-term unemployment had instilled poor habits amongst some individuals. The SE management at times picked them up from home to help them establish good habits, which they believed would be vital for they when transitioned into other mainstream employment. SE staff showed considerable empathy and care for their employees that resulted going 'above and beyond' for them. It also revealed the 'messiness' and challenges SEs faced providing employment opportunities for individuals from marginalised communities.

The SE staff were also seen to be actively providing further educational opportunities for some employees. As outlined in section 7.2.7, many individuals left school early with few formal qualifications. SE management believed the traditional school system often did/could not provide the necessary support and services these individuals required. An employee stated:

> *"I got kicked out of school early. They tagged me/stereotyped me and tried to put me in a box. [I] got stood down from school at 15. I started working not too long after that".*

In response, tailored programmes were established, particularly for disabled individuals, where specialised tutors provided intensive individual or small group sessions. The SE organisations employing non-disabled individuals at times covered costs required to obtain new qualifications, while also providing support and encouragement. The provision of educational opportunities revealed a broader commitment amongst some of the SE organisations to be more than employment providers. The education required considerable time and money to facilitate which placed further strain on their financial bottom line. It is reasonable to assume that traditional for-profit organisations would likely be unwilling to incur these additional costs.

The SE organisations reiterated their commitment to employing individuals from a similar background e.g., at-risk youth, those with disabilities, or former prisoners. This meant employees

worked alongside people with similar stories and experiences. Some individuals shared this during the interviews stating:

> *"I found working alongside ex-prisoners [like myself] has been really good as they're keen to prove themselves".*

> *"One of the biggest impacts on my life is having a lot of friends here that are like me. I don't feel as alone when I'm working here because people are just like me".*

The SEs provided a space that allowed their employees to develop relationships based on solidarity arising from their shared experiences of economic and social exclusion. These shared lived experiences and upbringings likely enabled many individuals to establish strong social connections. The quantitative data that showed levels of loneliness declined considerably and the frequency of contact with friends reported increased substantially. Existing literature has suggested shared experiences can improve social bonds, for example, Teasdale (2012) suggested SEs could provide a space for excluded groups to develop close bonds with those in a similar situation. Akingbola et al. (2015, p. 182) stated:

> *"SE employees appear to attribute the strong communal bond to the shared experiences that they have with the mental health system".*

The creation of a shared social identity has been linked to further positive outcomes. Qian et al. (2019) outlined the employment of individuals from a specific group could increase feelings of belongingness, reduced reliance on family and households, and created networking opportunities. Henderson et al. (2020) pointed out shared social identity has been identified as having positive impacts on health and wellbeing. This study suggests working alongside a group of similar individuals can help some people navigate changing life circumstances together. By creating access to social networks of people with similar experiences who are otherwise marginalised in society, employment-focused SEs can help individuals feel part of a community and foster the development of a shared social identity. The research findings suggest SEs have unique workplace environments due to their focus on the provision of employment opportunities for a specific marginalised group. This differentiates these organisations from other businesses that provide job opportunities.

Overall, the interviews, conversations and indirect observations revealed SEs are organisations with distinctive workplaces that offer a range of goods and services that can expand the capabilities of their employees to achieve wellbeing. The management were seen to invest considerable time, money, and energy into their employees. This reflected a strong commitment to a core social mission

that was deeply embedded within their organisation's ethos and leadership style. On reflection it is evident the five SEs were more than simply employment providers and cannot be easily replicated. Akingbola et al. (2015) also came to a similar conclusion and referred to SEs as 'unique' organisations. The findings indicate SEs have often developed specialist capabilities overtime that enable them to employ individuals from marginalised communities, and these differentiate them from other employment providers.

7.5 Conclusion

This chapter has provided a discussion of the key findings and results from this research. It examined these in the context of the relevant SE and capability literature. SEs organisations intentionally strive to address social and/or environmental issues, supporting their efforts through commercial revenue gathering activities (Ridley-Duff & Bull, 2019; Stevens et al., 2015; Weaver, 2019; Young & Lecy, 2014). This study focused on firms that provided employment opportunities to individuals from marginalised communities. The five employment-focused SEs were found to have improved the wellbeing of many individuals within the sample group. Employees reported enhanced functionings, or achieved states of being and doing, after joining their respective firm. Some of these were shown through regression modelling to influence changes reported in their subjective wellbeing. It is inferred from these findings the SE organisations enhanced the capabilities of some of their employees. More broadly, this research supports existing claims that SEs are institutions that can advance multidimensional human development (Weaver, 2019); can have a positive influence on particular groups in society (Akingbola et al., 2015); and can empower people (Tanekenov et al., 2018). This chapter has provided evidence SEs are institutions that can provide some individuals with opportunities and freedoms to lead lives they value and have reason to value (Scarlato, 2013; Weaver, 2018, 2019). The following chapter will bring together the various strands of this thesis and will deliver some final remarks.

Chapter 8

Conclusion

8.1 Introduction

The SE sector in New Zealand has received considerable attention over the last three years. In 2018, the Social Enterprise Sector Development Programme was established to help drive growth and enhance collaborative efforts between the public and private sector. It was founded on the view that a thriving SE sector could help tackle serious social and environmental problems. In April 2021, a report was released detailing specific, strong and significant recommendations for the New Zealand Government, these would support the creation of the necessary conditions for SE growth. The Honourable Priyanca Radhakrishnan, Minster for the Community and Voluntary Sector stated:

> *"Social enterprises are businesses that are changing the world for the better. They are businesses whose primary purpose is to make a meaningful social or environmental impact. Our government recognises the unique value and powerful potential of the social enterprise sector" (Ākina Foundation, 2021, p. 5).*

This statement is indicative of growing political awareness a healthy SE sector will contribute positively to New Zealanders and their communities.

This thesis has addressed the impact five New Zealand employment-focused SEs had on peoples' wellbeing. Their core social mission is to provide opportunities for marginalised communities to participate in the market economy. Existing literature has proposed SE institutions can enhance wellbeing. However, there is little evidence underlying these claims, particularly knowledge that goes beyond simple quantification of client numbers. The lack of empirical data has prompted some to prompted some to question if the claims are matched by reality (Munoz et al., 2015; Roy et al., 2014). Sarracino and Fumarco (2018) called for more quantitative assessments of the impact SEs have on wellbeing. Given the growing attention the SE sector is receiving in New Zealand, it is important to understand and evaluate their contribution to wellbeing, and review the assumption interactions with these organisations are always rewarding and empowering (Munoz et al., 2015). This thesis has answered these calls and sought to provide some insight.

This study has utilised Amartya Sen's CA to conceptualise wellbeing. The approach has been highly influential, and informs foundational thinking behind New Zealand's Wellbeing Budget and Living Standards Framework. Hall (2019, p. 38) in the article 'New Zealand's Living Standards Framework –

what might Amartya Sen say?' stated the approach has been the guiding light for international efforts to improve the measurement of national wellbeing. The approach proposed the concepts of capabilities and functionings. Capabilities refer to the opportunities and/or freedoms available to people to lead lives they value and have reason to value. Functionings refer to states of being and/or doing that people achieve. The CA has informed thinking behind poverty, economic development, justice, inequality and wellbeing.

More recently it has been applied across SE literature. Scarlato (2013) initially found SEs could act as sites for the development of collective capabilities. Kato et al. (2017) argued the CA could be used to comprehensively assess the impact of programmes, institutions, and projects, as it incorporated social context, beneficiary's perspectives, and viewed beneficiaries lives more holistically. It was argued the social value generated by SEs should be reconceptualised around the CA. Weaver (2019) introduced the social capability intervention model and the concepts of social capabilities and social functionings. Social capabilities referred to the opportunities created through a SEs services and activities that advanced human wellbeing; while 'social functionings' referred to the actual impact these services and products had on beneficiaries. The current applications of the CA have been primarily theoretically grounded, and few empirical studies exist. This thesis has extended the application of the approach within a SE context.

This research focused on five SEs in New Zealand whose mission centred on employment creation for marginalised people. The selection of SE organisations with an employment focus was driven by several considerations. Firstly, they had clear social missions and operated in a commercial setting providing a variety of goods and services. Secondly, their employees were accessible as they worked together. This study aimed to create new knowledge on the impact these SEs have on the reported wellbeing of their employees, which was conceptualised around the CA. It addressed four research questions which are now provided for convenience.

RQ1. How does individual's wellbeing compare before and after they join a social enterprise organisation?

RQ2. How does the wellbeing of those that interact with a social enterprise compare with other population groups in New Zealand?

RQ3. What are the explanatory factors behind individual's subjective wellbeing prior to their involvement with a social enterprise organisation?

RQ4. Do social enterprise organisations impact the factors behind an individual's subjective wellbeing, and if so, does this affect the changes individual's report in their subjective wellbeing?

Structured interviews were used to assess the wellbeing of current SE employees. Individuals were questioned about their current wellbeing, and were asked to recall their wellbeing before joining a SE. In-person interviews allowed questions and wording to be clarified for participants. The questionnaire design was guided by secondary data. The absence of a counter-factual group necessitated the use of these data sources as a comparatory group. The interviews assessed eight domains of wellbeing using 17 indicators. The use of secondary data focused the study on employees' functionings, that is their achieved states of being and/or doing. Individuals' capabilities were not directly observed, but could be inferred from the data collected.

The relationships between functionings were assessed using multiple linear regression. This thesis specifically focused on the relationships between subjective wellbeing and the other wellbeing domains. The regression models provided insight into the linear relationships that existed between the functionings, and facilitated the exploration of the explanatory factors behind employees' overall life satisfaction. The capability literature has explored these types of relationships using regression models (Anand, 2016; Anand et al., 2005; Anand et al., 2011; Anand & Van Hees, 2006). This thesis found few instances of these relationships being examined in SE literature, and sought to contribute further insight.

8.2 Summary of research findings

This research assessed the impact of five employment-focused SEs in New Zealand. They operated across a variety of sectors including transport logistics, manufacturing, and construction. The organisations provided employment opportunities for disabled persons', former prisoners, at-risk youth, and Māori and Pasifika. This study found many of these individuals reported improved wellbeing after joining a SE organisation. The sample group achieved valued states of being and/or doing, and it is inferred that SEs enhanced the capabilities of some of their employees. The following section will provide a brief summary of the key research findings.

This study found the sample group recalled low levels of wellbeing prior to joining a SE. Many reported social isolation; low levels of trust; struggles to express their identity; an inability to meet daily needs; and had received little formal education. It was found that 46.2 per cent of the sample group had been unemployed. These findings show many employees faced some form of social and economic exclusion. The LSF dashboard showed a higher percentage of employees reported low wellbeing across most indicators compared with New Zealand's general and disabled population. These findings affirm the core social mission of the five SEs. It showed these organisations strive to provide marginalised communities with opportunities to participate in the market economy. This

research supports existing literature that has argued employment-focused SEs provide valuable services for vulnerable groups of people.

This thesis has extended the application of the CA in SE literature. It assessed individuals achieved functionings before and after joining their respective organisation. The existing literature landscape has been primarily theoretically focused, and there have been few empirical studies that examine beneficiaries' capabilities or functionings. The findings of this study show many individuals within the sample group often did not achieve valued states of being and/or doing before joining a SE. For example, it was found 63.4 per cent had an overall life satisfaction score between 0-6, while 16.2 per cent reported a score between 9-10. In comparison, New Zealand's general population reported higher satisfaction with their lives. The data showed 18.9 per cent had an overall life satisfaction score between 0-6, while 31.9 per cent reported a score between 9-10. The reduced achieved functionings amongst the sample group could be attributed to a lack of capabilities, that is the opportunities and/or freedoms to lead lives they value and have reason to value.

It was found the reported wellbeing of the sample group improved after their employment with a SE. Employees reported being more socially connected and engaged, had access to help in a crisis, and improved trust for others in society. More individuals reported an income that meant they were able to sufficiently meet their everyday needs. While others expressed greater overall satisfaction with their lives. These findings show the five SEs enhanced the wellbeing of some individuals within the sample group. They were found to have achieved enhanced states of being and/or doing. This likely reflected new opportunities and freedoms gained through their employment with a SE. The expansion of capabilities enabled them to pursue lives they valued and had reason to value. The open-ended questions provided important qualitative insight, and showed individuals indeed valued the impacts SE had on their wellbeing. The results provide insight and evidence that is consistent with existing research that claims SEs have a positive impact on communities and their people.

This research also extended the application of the CA in SE literature by exploring the relationships between functionings. The multiple linear regression models provided useful insight into the sample population's wellbeing prior to employment, and the reported changes after joining their respective SE organisation. This has created new knowledge on the impact employment-focused SE have on peoples' wellbeing.

The study identified several explanatory factors behind the sample groups' subjective wellbeing before they joined a SE. Those that reported being in good health, expressed strong trust in others, and had sufficient income to meet daily needs were likely to be more satisfied with their lives. There is little corroborating SE research that has examined these relationships. A broader scope of

literature found these findings were consistent with studies that examined these relationships. In addition, the regression models found younger participants were less satisfied with their lives than older age cohorts. Pasifika people also reported lower life satisfaction than their New Zealand European counterparts. These findings were consistent with results from the initial summary data tables produced in chapter 6. The regression models provided some useful insight on current employees' perceptions of their wellbeing before joining a SE. It also provided evidence on the relationships between achieved functionings, and the factors behind their subjective wellbeing.

The regression models also explored the explanatory factors behind the changes in subjective wellbeing individuals reported after joining a SE. Individuals were more satisfied with their lives after achieving enhanced states of being and/or doing. Those that reported improved social connectedness, trust levels, and income sufficiency were likely to report improved overall satisfaction with their life. In addition, this research also found a relationship between the duration of employment with a SE and subjective wellbeing. Those who had not been employed long were less satisfied with life than those who had been employed longer. Stable employment likely provided certainty, routine and enabled individuals to develop meaningful social connections. It was also found the youngest participants reported larger changes in subjective wellbeing than the older cohorts. While those of Pasifika descent were shown to report larger changes than New Zealand Europeans. These research findings have provided useful insight into the relationships between functionings and employees' wellbeing. The data shows some groups experienced larger wellbeing changes than others, and could mean the impact of SE is not consistent across different socio-demographic groups.

This study also found complexity associated with assessing the impact of SE. Individuals reported a variety of experiences with their respective organisations. As outlined, the subjective wellbeing of the sample population improved after their employment with a SE. The average overall life satisfaction increased from 5.34 ± 2.76 to 8.03 ± 1.98. When examined more closely it was found 68 individuals had reported improvements, 10 reported a deterioration, and 15 reported no change in subjective wellbeing. This diversity of change was not limited to subjective wellbeing and extended across the wellbeing domains. This research proposes any broad claims of impact should be aware of the underlying complexities associated with individuals' experiences with employment-focused SEs.

To conclude, this thesis has provided important insight on the impact five SEs had on peoples' wellbeing. These organisations were shown to often have a positive impact on the wellbeing of their employees. These individuals achieved enhanced states of being and/or doing which could be attributed to the expansion of their capabilities.

8.3 Policy implications

Public policy should contribute to expanding the capabilities of people to lead lives they value and have reason to value. The findings from this study can help inform and support local, regional and national policy and decision-making concerning New Zealand's SE sector and the benefits it can offer. The implications are as follows:

1. Employment-focused SEs can have positive and valued impacts to the wellbeing of individuals from marginalised communities.

2. Employment-focused SEs can have positive impacts on the wellbeing of different socio-demographic groups.

3. Employment-focused SEs can impact the wellbeing domains that influence changes individuals' report in their subjective wellbeing.

This study found the employment-focused SEs overall had a positive impact on their employees' reported wellbeing, and provided opportunities and freedoms to pursue lives they valued and had reason to value. Individuals reported more frequent contact with friends, reduced levels of loneliness, and increased levels of trust. Non-disabled employees reported an increase in their annual income which often enabled them to better meet their everyday needs. Those released from prison valued the opportunities to obtain job references that would help them to enter other mainstream employment. Those with disabilities valued the accommodating environment that enabled them to participate in the workforce. The study observed that many employees did not believe there were many other employment opportunities outside their current SE. Thus, these findings have shown SE organisations can fulfil an important role within New Zealand society, and can improve the wellbeing of individuals from marginalised communities. These findings can help inform policy decisions at the local, regional and national level that focuses on the development and growth of the SE sector.

This research observed that employment-focused SEs provided job opportunities for individuals from marginalised communities. Before joining their respective organisations, the sample population reported lower wellbeing across a range of indicators in comparison with New Zealand's general and disabled population. The application of the LSF dashboard further highlighted these differences in wellbeing. The study found many individuals had left school early and did not often hold formal qualifications, in particular higher-level tertiary degrees. A number of employees reported social isolation, loneliness and a lack of contact with friends. In addition, they had found it difficult to express their identity and were untrusting of others in society. It was also observed that a large

proportion of the sample group had been unemployed before joining a SE organisation. Thus, the findings have shown SEs offered valuable employment to marginalised individuals, who prior to joining the firms often reported lower levels of wellbeing compared to other population groups in New Zealand.

This research observed that employment-focused SEs provided job opportunities to a diverse range of groups including those previously incarcerated, at-risk youth, Māori and Pasifikia, and those with disabilities. This study found that overall, the firms had a positive impact on these groups. It observed many individuals within the sample population reported improvements in their wellbeing. Subjective wellbeing improved broadly across different socio-demographic variables including: gender, age, ethnicity and disability status. Younger individuals (18-24 years), Māori and Pasifika reported substantial improvements in their life satisfaction after joining a SE. This research has shown SEs can have positive wellbeing benefits that extend across a range of marginalised groups. These findings could be used to help inform initiatives or policy focused on the SE sector in New Zealand.

This study observed individuals often experienced positive changes across a range of wellbeing domains after joining their respective SE. Regression modelling observed changes reported across the civic engagement and governance, jobs and earnings, and social connectedness wellbeing domains, were statistically associated with the changes employees reported in their subjective wellbeing. This research has provided evidence that SEs deliver wellbeing benefits, and also given insights into the explanatory factors that may influence the changes individuals report in their subjective wellbeing. These findings can also inform policy focused on the SE sector in New Zealand.

This research focused on SEs whose core social mission is the provision of employment opportunities for individuals from marginalised communities. It has presented evidence that shows the SE sector can deliver positive wellbeing benefits. Thus, to support their efforts and contributions to wellbeing, policymakers could help SE organisations through the following:

1. Provision of subsidies for social externalities and costs incurred employing marginalised workers.

This research observed employing individuals from marginalised communities gives rise to social externalities that can be financially and resource intensive. These externalities are not encountered in a typical for-profit business that employs individuals with strong employment history and suitable set of qualifications. Existing literature has observed SEs can encounter challenges and tensions from balancing a social mission with commercial revenue-gathering activities (Muñoz & Kimmitt, 2019; Stevens et al., 2015; Tian & Smith, 2014; Yin & Chen, 2019). These may result in additional financial costs that affect the organisations financial position. SEs can be forced to pass on extra costs

associated with employment and training to consumers (Lysaght et al., 2018). To support a flourishing and competitive SE sector that provides employment opportunities, policymakers should consider providing subsidies and additional support to help off-set some of these costs.

2. Support SE efforts to assess their impact on wellbeing. The organisations often do not have the expertise, time, or financial capacity to carry out a comprehensive assessment.

SE through their pursuit of dual bottom lines can face pressure to demonstrate/convey their economic (i.e., their profitability) and social value (i.e., impacts on wellbeing). Effectively conveying economic (i.e., their profitability) and social value (i.e., impacts on wellbeing) can help SEs differentiate themselves from other businesses operating in the marketplace, and encourage customers to consume their goods and services. However, this is often time-consuming, resource intensive and requires a high-level of expertise (Abramson & Billings, 2019). It is recommended that SEs are supported in their efforts to measure and convey their social value. Government could provide additional funding and/or training to support the SE sector communicate their contributions to broader economic, social, and environmental goals. Establishing a consistent set of tools and indicators could also aid New Zealand SEs efforts to assess their social value.

3. Promoting and incentivising the social procurement of goods and/or services generated by the SE sector. This will support SEs financial sustainability and their commercial activities that fund their core social mission.

It is recommended social procurement is promoted and incentivised to support SE goods and/or services. Central government has significant purchasing power that could be directed towards supporting the SE sector. This could be achieved through coordinating action across government agencies and supporting their procurement teams to implement broader outcomes within procurement. In addition, putting in place effective market connections with intermediaries could help connect the private/public sector with SEs and grow the social procurement market.

4. Renew the government's position on SE and clearly signal where SE fits within a wellbeing economy.

It is recommended the New Zealand Government reviews their position statement on SE and their support for the sector. Further clarification is needed on where the SE sector fits within New Zealand's wellbeing economy and the LSF. In 2021, the Social Enterprise Development Programme concluded. It is recommended the programme (or similar) is renewed to support collaborative action between the SE, public and private sectors, and inform policy decision-making related to SE.

5. Support SEs to transition employees into other mainstream employment.

This study observed that many employees considered there were limited employment opportunities outside their respective SE. It is recommended that government supports the SE sector efforts to help transition individuals into other mainstream employment. This could be facilitated through incentivising collaboration and partnerships between the SE and private/public sectors to support these transitions. If this could be done successfully it would enable SEs to bring in new individuals that may benefit from the employment opportunities.

This research can be used to inform policy and has presented evidence showing employment-focused SEs are actively contributing to improving the wellbeing of vulnerable communities in New Zealand. The organisations have been shown to provide meaningful job opportunities for individuals that often confront significant economic and social barriers to employment.

8.4 Research limitations

This section addresses the limitations associated with this research. It will initially address the absence of a counterfactual group and the use of secondary data sources. It will then look at endogeneity which related to presuming unidirectional causality between involvement with a SE and changes in wellbeing. Finally, the selection and interviews biases that emerged during the research process will be addressed.

The lack of a counterfactual group for comparatory purposes introduced some limitations. This research did seek to find similar groups of individuals that were not employed with a SE organisation; however, this proved challenging, and no suitable groups were found. The lack of a counterfactual group meant that it was difficult to establish causality between SE employment and their impact on wellbeing. This affected the study's ability to attribute the reported changes in individuals' wellbeing to their involvement with a SE organisation. As outlined in chapter 2, not properly accounting for the 'Ashenfelter Dip' could occur without a counterfactual group of individuals (Ashenfelter, 1978; Heckman & Smith, 1995; Qian et al., 2019). The Ashenfelter Dip recognised those that joined employment programmes had typically faced negative events earlier that impacted their employment, and drove them to seek the programme in the first place. This phenomenon falsely enhanced the effects of employment programmes on individual's when pre- and post-programme were compared. Determining the effect of programmes or interventions using difference can lead to overestimated treatment effect.

This study has identified there could be limitations associated with endogeneity. The problem arises when incorrectly presuming unidirectional causality (Acharyya & Bhattacharya, 2019). Attributing the

reported changes in wellbeing to employment with a SE organisation is difficult. As this research did not include counter-factual groups, it is possible these reported changes were the result of other factors. This was pointed out in chapter 7 with discussing changes across the housing wellbeing domain. In an ideal scenario, the wellbeing of individuals would have been assessed before they joined a SE, and then followed up with repeat assessments during and after their employment. This would provide greater certainty around the impact SE organisations are having on the wellbeing of people.

The use of a 'before-and-after' impact evaluation approach faced some limitations. Current employees were asked to consider life before joining a SE. This provided some insight into wellbeing before involvement with their respective organisation. However, it did mean the study was reliant on people accurately recalling their life. As outlined in chapter 7, there was the potential for recall biases that introduced inaccuracies when employees' thought back on life prior to joining a SE. This was likely to become increasingly prominent as the duration of employment increased, and could give rise to further inaccuracies or distorted recollections. This could have been potentially mitigated further through the screening of employees who had been employed for a long time i.e., greater than 10 years. The self-reported data could have also been biased with individuals selectively recalling experiences, events, and giving fitting or expected responses. Finally, concentrating on current employees meant the selection process also did not consider those who had left an SE organisation, introducing survivor bias which is a form of selection bias.

This research utilised secondary data sources in place of the counter-factual group. The data facilitated comparison of SE employees' wellbeing with other population groups in New Zealand. The data was obtained from Statistics New Zealand, and it was recognised these sources presented limitations for this study. They guided the questions that could be asked in the structured interviews, and it was understood these had been constructed and developed for different purposes. The secondary data sources also guided the wellbeing indicators used, and placed constraints on the areas of the CA that could be assessed. These sources had not been designed to examine individuals' capabilities (opportunities and/or freedoms) and instead only assessed functionings (achieved states of being and/or doing).

The selection of interview participants introduced biases that are acknowledged as limiting factors in this study. The research collected a sample group that consisted of current SE employees. The selection of this sample group was guided in part with the help of SE management staff. This aided with the selection of suitable participants and established rapport/trust between the researcher, management and employees. It was also particularly important due to the vulnerable nature of the sample group. Management provided insight on employees that were suitable and open to

participating in the research. This did however introduce selection bias as individuals may have been selected as they would best represent the organisation and their impact on wellbeing.

This study also confronted interview biases. The use of structured interviews to collect data allowed employees' to be stepped through the questionnaire when needed. Questions could be read out, re-phrased, and/or repeated to help individuals. The in-person nature of the interview did introduce the possibility of interviewer bias. It was recognised some participants may have provided answers considered 'favourable' to the researcher. Efforts were made to minimise this influence. For example, the research information sheet distributed to all participants reiterated all answers were acceptable. Individuals were also informed their responses would be confidential and anonymous. Despite these mitigation efforts it was recognised employees may still have wanted to provide favourable answers for themselves or their SE.

As outlined in chapter 2, SE organisations pursue a diverse range of social and/or environmental missions. This research focused solely on SE organisations whose social mission was to provide employment opportunities to individuals from marginalised communities. This study is therefore limited in its ability to make general statements regarding the impact all SE organisations have on wellbeing. In addition, the focus on domestic SEs limits the ability to make general statements regarding the impact of organisations abroad. The sample group consisted of people from a diverse set of backgrounds, but a large proportion consisted of individuals with disabilities. This reflects the current state of New Zealand's SE sector, where few established organisations are not focused on providing employment for this group. The high proportion of disabled individuals within the sample group should be noted when generalising these research findings, particularly when referring to the impact SE has on the wellbeing of people. Nevertheless, despite these limiting factors, this study has provided important evidence and insight for New Zealand's SE sector.

8.5 Future research

This thesis assessed the impact employment-focused SEs had on peoples' wellbeing. The study provided useful insight and evidence; however, there remains considerable scope for future projects. This section outlines some directions for future research. These suggestions are based around examining impact using a counter-factual group; broadening the assessment of wellbeing to include capabilities and conversion factors; using smaller income brackets when assessing impact on earnings; and looking at the long-term implications of involvement with a SE organisation.

Future research in this area may look to include a counter-factual group. This group would consist of a similar population that were not employed with a SE organisation. The counter-factual group would enable an impact evaluation that better identified which parts of the observed improvements could

be attributed to the SE, rather than other external factors. It would provide additional evidence of causal links between SE and their impact on individual wellbeing, and would go some way to addressing the issue of endogeneity.

This research focused on achieved functionings. Future studies may consider assessing individuals' capabilities, that is the opportunities and/or freedoms available to them to lead lives they value and had reason to value. Martha Nussbaum laid out a list of 10 central capabilities that were vital for all humans. This could provide a suitable starting point for a study based around people's capabilities. In addition, the assessments could extend to the resources available to individuals, and the conversion factors that enabled the transformation of these resources into achieved states of being and/or doing. This assessment would likely not be able to rely on secondary data sources. Instead, questionnaires would need to be developed that could assess these capabilities and/or conversion factors. There are some studies within existing literature that provide insight into how this could be approached (refer to (Al-Janabi et al., 2013; Ferrer et al., 2014; Greco et al., 2015).

Future research may consider implementing a longitudinal assessment of employees' wellbeing. This approach would involve assessing individual's wellbeing on multiple occasions, and would provide more clarity on the impact of SE employment. Williams et al. (2016) advocated for longitudinal case studies that focused on SE beneficiaries and their communities. It was argued these would provide more insight and evidence to substantiate claims regarding the impacts of SE. A longitudinal study may look to assess an individual's wellbeing before and after they physically join a SE organisation. This would a reduce reliance on people accurately recalling their wellbeing, and would help minimise potential participant biases.

This study provided a cross-sectional assessment of individuals' wellbeing, but did not assess the long-term implications of SE employment. Future research should consider assessing the long-term impacts SEs have on wellbeing. This would useful as it is unclear if individuals transitioned successfully into other mainstream employment. This research found many individuals held considerable doubt and scepticism about finding work outside the SE. Many perceived future employment was dependent on the SE organisation; while others cited the work experience, job references, new skills and qualifications would enable them to achieve other mainstream employment. Future research that examined long-term outcomes would provide greater clarity on individuals' employment trajectory and impacts on their wellbeing.

This thesis assessed the impact five employment-focused SEs had on the wellbeing of individuals. These organisations provided employment opportunities for people with disabilities, ex-prisoners, Māori and Pasifika, and at-risk youth. Future research could look to include individuals from groups

that were not represented within the scope of this research, for example, the homeless and refugee communities. This would provide more insight into the impact SEs have on different groups. This study has shown the impacts may not be consistent for all sub-populations. Future research may look to explore the experiences of different groups further. This could enhance our understanding on the impact employment-focused SE have on people's wellbeing.

Future research may also consider adapting income brackets when assessing the impact SEs have on individuals' earnings. This study obtained the reported income of employees' before and after they joined their respective organisation. It found there was no change in the average annual income for those with disabilities. This could be attributed to the minimum wage exception scheme; but may have also been due to the size of $10,000 income brackets which were not sufficiently granular to observe smaller changes in income. Therefore, future research should consider using smaller income brackets when assessing changes in earnings.

Finally, future studies should look to expand the assessment of relationships between functionings. This research provided some useful insight on these relationships exploring the explanatory factors behind subjective wellbeing. This expanded the application of the CA within SE literature, and deepened our understanding on the impact employment-focused SEs have on their employees' wellbeing. There remains plenty of scope for researchers, and future studies may consider exploring additional relationships, wellbeing domains and variables. They may also consider examining the relationships between subjective wellbeing and capabilities. There are some existing studies within capability literature; however, few have been conducted in a SE context.

8.6 Concluding remarks

This research focused on five SEs in New Zealand whose mission centred on employment creation for marginalised people. The study aimed to create new knowledge on the impact these SEs had on the reported wellbeing of their employees. These hybrid organisations pursued a dual-bottom line occupying a position between the non-profit and for-profit sectors. They were inspired by a core social mission and pursued revenue-gathering activities in a commercial marketplace. Amartya Sen's CA was applied to conceptualise wellbeing around capabilities and functionings. The approach has been used in SE literature, but has been limited to mainly theoretical applications. This thesis sought to contribute to this body of literature by assessing the impact the SE organisations had on employees' wellbeing, specifically their achieved functionings.

The findings from this research showed the SE organisations had a positive impact on the wellbeing of the sample group. Many individuals reported achieving improved states of being and/or doing. They were often found to be more socially connected and trusting of others; more educated; and

were overall more satisfied with their lives. These changes are attributed to an expansion of opportunities and/or freedoms available to employees to lead lives they value and have reason to value. This study also assessed the relationships between wellbeing domains and their corresponding achieved functionings. Multiple linear regression models were used to explore the explanatory factors behind the changes employees reported in their subjective wellbeing. The findings showed SEs enabled individuals to achieve valued states of being and/or doing across some wellbeing domains, and these were associated with the improvements reported in their subjective wellbeing. The results from this thesis are consistent with existing literature that argues SE can have a positive impact on individuals. In conclusion, this research has provided some valuable evidence and insight on the impact of employment-focused SEs. It has shown these organisations can be useful tools for enhancing the wellbeing of people from marginalised communities in New Zealand.

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Appendix A

A Central List of Human Capabilities

1. Life. Being able to live to the end of a human life of normal length; not dying prematurely, or before one's life is so reduced as to be not worth living.

2. Bodily health. Being able to have good health, including reproductive health; to be adequately nourished; to have adequate shelter.

3. Bodily integrity. Being able to move freely from place to place; to be secure against violent

4. Senses, imagination, and thought. Being able to use the senses, to imagine, think, and reason – and to do these things in a ''truly human'' way, a way informed and cultivated by an adequate education, including, but by no means limited to, literacy and basic mathematical and scientific training. Being able to use imagination and thought in connection with experiencing and producing works and events of one's own choice, religious, literary, musical, and so forth. Being able to use one's mind in ways protected by guarantees of freedom of expression with respect to both political and artistic speech, and freedom of religious exercise. Being able to have pleasurable experiences and to avoid non-beneficial pain.

5. Emotions. Being able to have attachments to things and people outside ourselves; to love those who love and care for us, to grieve at their absence; in general, to love, to grieve, to experience longing, gratitude, and justified anger. Not having one's emotional development blighted by fear and anxiety. (Supporting this capability means supporting forms of human association that can be shown to be crucial in their development.)

6. Practical reason. Being able to form a conception of the good and to engage in critical reflection about the planning of one's life. (This entails protection for the liberty of conscience and religious observance.)

7. Affiliation. A. Being able to live with and toward others, to recognize and show concern for other human beings, to engage in various forms of social interaction; to be able to imagine the situation of another. (Protecting this capability means protecting institutions that constitute and nourish such forms of affiliation, and also protecting the freedom of assembly and political speech.) B. Having the social bases of self-respect and non-humiliation; being able to be treated as a dignified being whose worth is equal to that of others. This entails

provisions of non-discrimination on the basis of race, sex, sexual orientation, ethnicity, caste, religion, and national origin.

8. Other species. Being able to live with concern for and in relation to animals, plants, and the world of nature.

9. Play. Being able to laugh, to play, and to enjoy recreational activities.

10. Control over one's environment.

Appendix B

OECD How's Life Wellbeing Framework

Material Conditions	**Indicators**
Income and Wealth	Household net wealth, Household Income
Jobs and Earnings	Employment, Earnings, Labour Market, Insecurity, Job Strain, Long-Term Unemployment
Housing	Rooms
Quality of Life	**Indicators**
Subjective Wellbeing	Life Satisfaction, happiness
Personal Security	Homicides, Feeling Safe at Night
Work-Life Balance	Working Hours, Time-off
Health Status	Perceived Health, Life Expectancy
Education and Skills	Cognitive Skills at 15, Adult Skills, Educational Attainment
Social Connections	Social support
Civic Engagement and Governance	Voter turnout and having a say in government
Environmental Quality	Air quality and Water Quality

Appendix C

Research Information Sheet and Consent Forms

Lincoln University

Research Information

Study Title: *"An Assessment of the Impact Social Enterprise has on the Wellbeing of People – A Capabilities Perspective*".

I would like to invite you to take part in a PhD research project. This research information sheet (RIS) will help you decide if you want to take part. It will outline why this research is being done and what it will involve for you. Please take time to read this carefully.

This study is examining the impact social enterprises' have on the wellbeing of people. Social enterprises are organisations that trade goods and services to support a social mission, for example, providing school lunches for kids without them. Wellbeing is something that refers to the things that we can do (such as hanging out with our friends) and what we can be (being well-fed). You have been asked to take part as you work for a social enterprise.

Taking part in this study is voluntary. You do not have to decide today. Feel free to talk with family, whanau or friends about the study before deciding. If you choose to be involved, you will complete a short survey questionnaire that will take around 15-20 minutes to finish. Your employer will not be shown your responses in the study or be present at the interview. You will have the opportunity to do the interview at your workplace or off-site. If you agree to take part, you will need to sign a consent form. Please note that agreeing to take part does not mean you will definitely take part – the researcher will randomly select from among those who volunteer.

The results of this study will be presented once the thesis is completed. Data that is presented in any publications will not identify you. All survey data will be seen only by myself and supervisors and will be stored in electronic form with password protection. You may withdraw from this project, including any information you have provided up to December 20th, 2019 by contacting me (Simon Duff), or my supervisors, Professor Caroline Saunders, and Professor Paul Dalziel.

This project has been reviewed and approved by Lincoln University's Human Ethics Committee. If you have any questions, concerns, or complaints about the study at any stage, please feel free to contact

me or my supervisors. The researcher will be along in one week to conduct the interviews with those that would like to participate.

Researcher: Simon Duff
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Lincoln University

Research Information Sheet

Study Title: "*An Assessment of the Impact Social Enterprise has on the Wellbeing of People – A Capabilities Perspective*"

I would like to invite you to take part in a PhD research project. This research information sheet (RIS) will help you decide if you want to take part. It will outline why this research is being done and what it will involve for you. Please take time to read the following information carefully.

This study is examining the impact social enterprises' have on the wellbeing of people. Social enterprises are organisations that trade goods and services to support a social mission, for example, providing school lunches for kids without them. Wellbeing is something that refers to the things that we can do (such as hanging out with our friends) and what we feel (happy).

You have been asked to take part as you work for a social enterprise. Your participation in the study will involve taking a short questionnaire which will take around 15-20 minutes to finish. It can be on a physical copy at your workplace or off-site. There will also be opportunities to complete it off-site should you choose.

Your participation in this study is voluntary and you do not have to take part. You do not have to decide today whether or not you will take part in this research. Feel free to talk about the study with other people - such as family, whanau or friends. Employers will not be present at the interviews. If you agree to take part in the study, you will be asked to sign a consent form. Please note that agreeing to take part does not guarantee participation – the researcher will randomly select from among those who volunteer.

You may withdraw from this project, including any information you have provided up to December 20th 2019 by contacting me (Simon Duff), or my supervisors (Professor Caroline Saunders and Professor Paul Dalziel) through the contact details below.

The results of this study will be presented once the thesis is completed. You may be assured of your anonymity in this research - the identity of any participant will not be made public or made known to any person other than Lincoln Universities Human Ethics Committee (HEC) in the event of an audit. All survey data will be seen only by myself and supervisors and will be stored in a secure location. Data that is presented in any publications will not identify you.

This project has been reviewed and approved by Lincoln University's Human Ethics Committee. If you have any questions, concerns, or complaints about the study at any stage, please feel free to contact me or my supervisors. The researcher will be along in one week to conduct the interviews with those that would like to participate.

Researcher: Simon Duff
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Ph. +64 21 060 7150

University Research Consent Form

Study Title: "*An Assessment of the Impact Social Enterprise have on the Wellbeing of People - A Capabilities Perspective*".

- ☐ I understand what this project is about.
- ☐ I understand that I do not have to take part in this research.
  I agree to participate in this project.
- ☐ I agree to the publication of the results of this project.
- ☐ I understand that no personal information will be published.
- ☐ I understand and consent to notes being taken during the interview and being used later for research purposes.
- ☐ I understand and consent to the interview's audio being recorded and being used later for research purposes.
- ☐ I understand that I may withdraw from this project, including the withdrawal of any information I have provided up to 20th of December 2019.

Name: _____

Signature:_____

Appendix D

Structured Interview Questionnaire

Lincoln University Doctoral Research

An Assessment of the Impact Social Enterprise has on the Wellbeing of People - A Capabilities Perspective

This survey questionnaire consists of four sections. To begin we would like to ask a few questions about you. These questions allow us to compare with similar groups of people during the next stage of research. Remember your responses are anonymous and will not identify you in any way.

Section 1 – General Information

1. **How old are you?**

   ……

2. **What is your gender? (Please tick the relevant box).**

   - ☐ Male
   - ☐ Female
   - ☐ Other

3. **Were you born in New Zealand? (Please tick the relevant box).**

   - ☐ Yes
   - ☐ No, recently migrated (within the last five years)
   - ☐ No, long-term migrant

4. **What Ethnic group(s) do you identify with? (Please tick the relevant box/es).**

   - ☐ New Zealand European
   - ☐ Māori
   - ☐ Samoan
   - ☐ Cook Island Māori
   - ☐ Tongan
   - ☐ Chinese
   - ☐ Indian
   - ☐ Other (Please specify:……)
   - ☐ Don't know

5. **Do you currently live with a spouse or partner? (Please tick the relevant box).**

   - ☐ Yes
   - ☐ No

6. **Do you currently have a physical/mental disability? (Please tick the relevant box).**

   - ☐ Yes
   - ☐ No
   - ☐ Would rather not say

7. **How long have you been working for the social enterprise? (Please tick the relevant box).**

   - ☐ Less than 1 year
   - ☐ 1-2 year
   - ☐ 3-4 years
   - ☐ 4-5 years
   - ☐ 6-10 years
   - ☐ 11-20 years
   - ☐ More than 20 years

8. **On average, how many hours a week do you work for the social enterprise?**

   ……..

9. **What is your role (job) at the social enterprise?**

   ……..
   ……..

10. **Were you employed before working at the social enterprise? (Please tick the relevant box).**

    - ☐ Yes (if so, please state:…….)
    - ☐ No

We will now ask you some questions about your current wellbeing

---

Section 2 - Current Wellbeing

1. **What is the highest level of education you currently hold? (Please tick the relevant box).**

   - ☐ NCEA/School Certificate Level 1
   - ☐ NCEA/School Certificate Level 2
   - ☐ NCEA/School Certificate Level 3
   - ☐ NCEA/School Certificate Level 4
   - ☐ National Certificates or Diploma level 1-7
   - ☐ Trade Certificate (e.g., building, plumbing)
   - ☐ Tertiary Degree – undergraduate
   - ☐ Tertiary Degree – postgraduate
   - ☐ Other - please specify……..
   - ☐ No qualifications

2. **Have you gained any qualifications/licenses (e.g., certificate, drivers or forklift licence) since joining the social enterprise? (Please tick the relevant box).**

   - ☐ Yes (If so, please state……..)
   - ☐ No

3. **How satisfied are you with life as a whole, where zero is completely dissatisfied, and ten is completely satisfied? (Please circle the appropriate number).**

0	1	2	3	4	5	6	7	8	9	10

4. **How would you rate your current general health? (Please tick the relevant box).**

   - ☐ Excellent
   - ☐ Very good
   - ☐ Good
   - ☐ Fair
   - ☐ Poor

5. **Do you currently smoke? (Please tick the relevant box).**

   - ☐ Yes
   - ☐ No

6. **People in New Zealand have different lifestyles, cultures, and beliefs that express their identity. Currently, how easy or hard is it for you to be yourself in New Zealand? (Please tick the relevant box).**

- ☐ Very easy
- ☐ Easy
- ☐ Sometimes easy, sometimes hard
- ☐ Hard
- ☐ Very hard
- ☐ Don't know
- ☐ Prefer not to say

7. **In the last 12 months have you experienced discrimination? (Please tick the relevant box).**

- ☐ Yes
- ☐ No
- ☐ Don't know
- ☐ Prefer not to say

8. **Did you vote in the last general election? (Please tick the relevant box).**

- ☐ Yes
- ☐ No
- ☐ Unsure

9. **In general, how much do you trust most people in New Zealand, with zero being not at all, and 10 completely trusting? (Please circle the relevant number).**

0	1	2	3	4	5	6	7	8	9	10

10. **How often have you felt lonely in the last four weeks? (Please tick the relevant box).**

- ☐ None of the time
- ☐ A little of the time
- ☐ Some of the time
- ☐ Most/all of the time

11. **How often do you have face-to-face contact with family? (Please tick the relevant box).**

- ☐ Daily
- ☐ At least once a week
- ☐ At least once a fortnight
- ☐ At least once in the last four weeks
- ☐ Not at all
- ☐ Prefer not to say

12. How often do you have face-to-face contact with friends? (Please tick the relevant box).

- ☐ Daily
- ☐ At least once a week
- ☐ At least once a fortnight
- ☐ At least once in the last four weeks
- ☐ Not at all
- ☐ Prefer not to say

13. Is there anyone you could ask for help in time of a crisis e.g., serious illness or injury? (Please tick the relevant box).

- ☐ Yes
- ☐ No
- ☐ Don't know
- ☐ Prefer not to say

14. How well does your total income meet your everyday needs such as accommodation, food, clothing and other necessities? (Please tick the relevant box).

- ☐ Not enough money
- ☐ Only just enough money
- ☐ Enough money
- ☐ More than enough money
- ☐ Prefer not to say

15. What is your current annual income bracket? (Please tick the relevant box).

- ☐ Zero income
- ☐ $1-5000
- ☐ $5,001-10,000
- ☐ $10,001-20,000
- ☐ $20,001-30,000
- ☐ $30,001-40,000
- ☐ $40,001-50,000
- ☐ $50,001-60,000
- ☐ $60,001-70,000
- ☐ $70,001-100,000
- ☐ $100,001-150,000
- ☐ Not sure
- ☐ Prefer not to say

16. How would you describe the condition of your house or flat? (Please tick the relevant box).

- ☐ No repairs or maintenance needed right now
- ☐ Minor maintenance needed
- ☐ Some repairs and maintenance needed
- ☐ Immediate repairs and maintenance needed
- ☐ Immediate and extensive repairs and maintenance needed
- ☐ Prefer not to say
- ☐ Don't know

17. **Does your house or flat have a problem with dampness or mould? (Please tick the relevant box).**

- ☐ No problem
- ☐ Minor problem
- ☐ Major problem
- ☐ Prefer not to say
- ☐ Don't know

18. **In winter, is your house/flat colder than you would like? (Please tick the relevant box).**

- ☐ Yes, always
- ☐ Yes, often
- ☐ Yes, sometimes
- ☐ No
- ☐ Don't know
- ☐ Prefer not to say

We are now going to ask a few questions about your wellbeing before you joined the social enterprise.

Section 3 – Wellbeing before Social Enterprise

1. **What qualifications did you have prior to joining the social enterprise? (Please tick the relevant box).**

   - ☐ NCEA/School Certificate Level 1
   - ☐ NCEA/School Certificate Level 2
   - ☐ NCEA/School Certificate Level 3
   - ☐ NCEA/School Certificate Level 4
   - ☐ National Certificates or Diploma level 1-7
   - ☐ Trade certificate (e.g., building, plumbing)
   - ☐ Tertiary Degree – undergraduate
   - ☐ Tertiary Degree – postgraduate
   - ☐ Other - please specify…….
   - ☐ No qualifications

2. **What year did you leave high school? (Please tick the relevant box).**

   - ☐ Year 9 or form 3
   - ☐ Year 10 or form 4
   - ☐ Year 11 or form 5
   - ☐ Year 12 or form 6
   - ☐ Year 13 or form 7
   - ☐ Didn't attend high school

3. **Before joining the social enterprise how satisfied were you with life as a whole, where zero is completely dissatisfied, and ten is completely satisfied? (Please circle the relevant number).**

0	1	2	3	4	5	6	7	8	9	10

4. **How would you rate your general health before you joined the social enterprise? (Please tick the relevant box).**

   - ☐ Excellent
   - ☐ Very good
   - ☐ Good
   - ☐ Fair
   - ☐ Poor

5. **Did you smoke before you joined the social enterprise? (Please tick the relevant box).**

   - ☐ Yes
   - ☐ No

6. **Prior to joining the social enterprise, how easy or hard was it for you to be yourself in New Zealand? (Please tick the relevant box).**

- ☐ Very easy
- ☐ Easy
- ☐ Sometimes easy, sometimes hard
- ☐ Hard
- ☐ Very hard
- ☐ Don't know
- ☐ Prefer not to say

7. **Prior to joining the social enterprise did you experience discrimination? (Please tick the relevant box).**

- ☐ Yes
- ☐ No
- ☐ Don't know
- ☐ Prefer not to say

8. **Prior to joining the social enterprise did you vote in general elections? (Please tick the relevant box).**

- ☐ Yes
- ☐ No
- ☐ Unsure

9. **In general, how much did you trust most people in New Zealand before joining the social enterprise, where zero being not at all, and 10 being completely trusting? (Please circle the relevant number).**

0	1	2	3	4	5	6	7	8	9	10

10. **Prior to joining the social enterprise how often did you feel lonely? (Please tick the relevant box).**

- ☐ None of the time
- ☐ A little of the time
- ☐ Some of the time
- ☐ Most/all of the time

11. **Prior to joining the social enterprise how often did you have face-to-face contact with family? (Please tick the relevant box).**

- ☐ Daily
- ☐ At least once a week
- ☐ At least once a fortnight
- ☐ At least once in the last four weeks
- ☐ Not at all
- ☐ Prefer not to say

12. **Prior to joining the social enterprise how often did you have face-to-face contact with friends? (Please tick the relevant box).**

- ☐ Daily
- ☐ At least once a week
- ☐ At least once a fortnight
- ☐ At least once in the last four weeks
- ☐ Not at all
- ☐ Prefer not to say

13. **Prior to joining the social enterprise was there anyone you could ask for help in time of a crisis e.g., serious illness or injury? (Please tick the relevant box).**

- ☐ Yes
- ☐ No
- ☐ Don't know
- ☐ Prefer not to say

14. **Before joining the social enterprise how well did your total income meet your everyday needs such as accommodation, food, clothing and other necessities? (Please tick the relevant box).**

- ☐ Not enough money
- ☐ Only just enough money
- ☐ Enough money
- ☐ More than enough money
- ☐ Prefer not to say

15. **Before joining the social enterprise what approximately was your annual income bracket? (Please tick the relevant box).**

- ☐ Zero income
- ☐ $1-5000
- ☐ $5,001-10,000
- ☐ $10,001-20,000
- ☐ $20,001-30,000
- ☐ $30,001-40,000
- ☐ $40,001-50,000
- ☐ $50,001-60,000
- ☐ $60,001-70,000
- ☐ $70,001-100,000
- ☐ $100,001-150,000
- ☐ Not sure
- ☐ Prefer not to say

16. **Prior to joining the social enterprise how would you describe the condition of your house or flat? (Please tick the relevant box).**

- ☐ No repairs or maintenance needed right now
- ☐ Minor maintenance needed
- ☐ Some repairs and maintenance needed
- ☐ Immediate repairs and maintenance needed
- ☐ Immediate and extensive repairs and maintenance needed
- ☐ Prefer not to say
- ☐ Don't know

17. **Prior to joining the social enterprise did your house or flat have a problem with dampness or mould? (Please tick the relevant box).**

- ☐ No problem
- ☐ Minor problem
- ☐ Major problem
- ☐ Prefer not to say
- ☐ Don't know

18. **Prior to joining the social enterprise, in winter, was your house/flat colder than you would have liked? (Please tick the relevant box).**

- ☐ Yes, always
- ☐ Yes, often
- ☐ Yes, sometimes
- ☐ No
- ☐ Don't know
- ☐ Prefer not to say

Section 4 - Impact of Social Enterprise

1. **What has been the most valued impact on your life since working at the social enterprise?**

……
……
……

2. **What would you be doing if you weren't working at the social enterprise?**

……
……
……

The questionnaire has now been completed. Thank you very much for your valued contribution to this research project.

Appendix E

Wellbeing of Social Enterprise Employees' and New Zealand's General Population

Table E 1 Employees' overall life satisfaction in comparison with the New Zealand's general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Overall life satisfaction		
	0-6	7-8	9-10
Stats NZ GSS 2008[1]	15.3	53.5	30.9
Stats NZ GSS 2010[1]	14.8	53.3	31.8
Stats NZ GSS 2012[1]	15.4	53.4	31.1
Stats NZ GSS 2018	18.9	49.3	31.9
Employees prior to SE	63.4	20.4	16.2
Employees after SE	21.6	32.3	46.3

[1]Different scales used in the surveys. Individuals that identified as 'very dissatisfied'; 'dissatisfied'; 'no feeling either way' were considered to have an overall life satisfaction score between 0-6. Individuals that identified as satisfied were considered to have an overall life satisfaction score between 7-8. Individuals that identified as very satisfied were considered to have an overall life satisfaction score between 9-10.

Table E 2 Employees' self-reported health status in comparison with the New Zealand general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Self-rated health status			
	Fair/poor	Good	Very Good	Excellent
Stats GSS 2008	14.8	27.7	36.3	21.2
Stats GSS 2010	15.1	28.1	35.1	21.7
Stats NZ GSS 2012	15.9	27.6	35.6	20.9
Stats NZ GSS 2018	14.7	30	38.8	16.5
Employees prior to SE[1]	31.2	24.7	29	15.1
Employees after SE[1]	15.1	31.2	37.6	16.1

[1]Fair/poor categories combined to facilitate comparison with the aggregated 2018 GSS data tables from Statistics New Zealand.

Table E 3 Employees' smoking status in comparison with New Zealand's general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Smoking status		
	Yes	No	DK/RF
Stats NZ GSS 2008	20.5	79.4	0.1
Stats NZ GSS 2010	18.5	81.5	0.0
Stats NZ GSS 2012	19.1	80.9	0.0
Stats NZ GSS 2018	14.8	85.2	0.0
Employees prior to SE	32.3	67.7	0.0
Employees after SE	26.9	73.1	0.0

Table E 4 Employees' ability to express themselves in comparison with New Zealand's general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Ability to express identity					
	Very hard	Hard	Sometimes easy/hard	Easy	Very Easy	DK/RF
Stats NZ GSS 2008	0.7	2.4	13.5	44.6	37.7	1.1
Stats NZ GSS 2010	0.7	2.1	13.3	43.8	39.5	0.5
Stats NZ GSS 2012	0.6	2.4	12.3	46.2	38.1	0.4
Stats NZ GSS 2018	0.4	1.5	14.2	33.5	50.3	-
Employees prior to SE[1]	8.6	14.0	28.0	25.8	19.4	4.3
Employees after SE	5.4	2.2	31.2	23.7	34.4	3.3

[1]Data not available for refused/don't category.

Table E 5 Employees' civic engagement in comparison with New Zealand's general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Voting Status		
	Yes	No[1]	DK/RF
Stats NZ GSS 2008	81.6	18.1	0.3
Stats NZ GSS 2010	82.1	17.6	0.2
Stats NZ GSS 2012	81.2	18.7	0.1
Stats NZ GSS 2018	81.5	18.4	-
Employees prior to SE[2]	53.8	44.1	2.2
Employees after SE	66.7	32.3	1.1

[1]Included those who were too young to vote at the time of election.
[2]Data not available

Table E 6 Employees' level of trust in comparison with New Zealand's general population derived from Statistics New Zealand 2018 general social survey (%).

	Trust in others[1]				
	0-2	3-4	5-6	7-8	9-10
Stats NZ GSS 2018	1.9	4.1	28.1	50.8	15.1
Employees prior to SE	14.0	19.4	25.8	29.0	11.8
Employees after SE	2.2	9.7	32.3	29.0	26.9

[1]Data unavailable from 2008-12 Statistics New Zealand GSS CURF.

Table E 7 Employees' reported levels of loneliness in comparison with New Zealand's general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Level of loneliness experienced				
	None of the time	A little of the time	Some of the time	Most/all of the time	RF/DK[2]
Stats NZ GSS 2008[1]	65.3	17.0	13.1	4.3	0.3
Stats NZ GSS 2010[1]	67.1	16.5	12.4	3.9	0.1
Stats NZ GSS 2012[1]	68.4	15.2	12.1	4.1	0.2
Stats NZ GSS 2018	61.0	22.4	13.1	3.5	0.0
Employees prior to SE	21.5	23.7	33.3	21.5	0.0
Employees after SE	46.2	28.0	17.2	8.6	0.0

[1]GSS 2008-12 focused around 'social isolation' compared with 'loneliness' in 2018 GSS. [2]Repondents refused to answer or didn't know.

Table E 8 Employees' level of face-to-face contact with family in comparison with New Zealand's general population level derived from Statistics New Zealand 2018 general social survey (%).

	Contact with family[1]					
	Daily	At least once a week	Around Once a Fortnight	At least once in the last month	Not at all	RF/DK
Stats NZ GSS 2018[2]	20.1	40.5	11.6	11.3	16.4	-
Employees prior to SE	58.1	17.2	2.2	10.8	7.5	4.3
Employees after SE	46.2	20.4	4.3	15.1	8.6	5.4

[1]Data not available from 2008-12 GSS CURF due to different measurement scales
[2]Data not available for refused/don't know category

Table E 9 Employees' level of contact with friends in comparison with New Zealand's general population derived from Statistics New Zealand 2018 general social survey (GSS) (%).

	Contact with Friends[1]					
	Everyday	At least once a week	Around Once a Fortnight	At least once in the last month	Not at all	RF/DK
Stats NZ GSS 2018[2]	26.8	46.9	10.9	8.2	7.1	-
Employees prior to SE	22.6	29	19.4	9.7	18.3	1.1
Employees after SE	51.6	32.3	7.5	4.3	3.2	1.1

[1]Data not available from 2008-12 GSS CURF due to different measurement scales
[2]Data not available

Table E 10 Employees' ability to get help in a crisis in comparison with New Zealand's general population derived from Statistics New Zealand 2008-12 general social survey (%).

	Help in a Crisis[1]		
	Yes	**No**	**RK/DK**
Stats NZ GSS 2008	95.9	3.7	0.4
Stats NZ GSS 2010	95.8	3.9	0.3
Stats NZ GSS 2012	96	3.7	0.3
Employees prior to SE	82.8	14.0	3.2
Employees after SE	96.8	3.2	0.0

[1]2018 GSS did not include question on help in a crisis.

Table E 11 Employees' experience of discrimination in comparison with New Zealand's general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Experienced Discrimination		
	Yes	No	DK/RF
Stats NZ GSS 2008	9.4	90.3	0.3
Stats NZ GSS 2010	10.0	89.8	0.1
Stats NZ GSS 2012	9.8	90.1	0.1
Stats NZ GSS 2018	17.4	82.6	-
Employees prior to SE	22.6	72.0	5.4
Employees after SE	17.2	78.5	4.3

[1]Data not available for the refused/don't know categories.

Table E 12 Employees' level of income sufficiency in comparison with New Zealand's general population derived from Statistics New Zealand 2018 and 2008-12 general social surveys (%).

	Income sufficiency to meet every day needs				
	Not enough	Only just enough	Enough	More than enough	DK/RF
Stats NZ GSS 2008	15.1	33.4	38.3	13.0	0.2
Stats NZ GSS 2010	16.0	33.2	37.5	13.3	0.1
Stats NZ GSS 2012	16.4	32.9	36.5	14.1	0.1
Stats NZ GSS 2018[1]	10.0	27.1	44.4	18.4	-
Employees prior to SE	31.2	28.0	28.0	11.8	1.1
Employees after SE	12.9	31.2	40.9	14.0	1.1

[1]Data not available for the refused/don't know category.

Table E 13 Employees' average level of income in comparison with New Zealand's general population derived from Statistics New Zealand 2008-12 general social survey (%).

	Annual Income[1]	
	Average Income	Corresponding Income bracket
Stats NZ GSS 2008	18.55	$25-30,000
Stats NZ GSS 2010	18.43	$25-30,000
Stats NZ GSS 2012	18.55	$25-30,000
Employees prior to SE[2]	5.01	$20-30,000
Employees after SE[2]	5.38	$20-30,000

[1]Average income data not available for 2018 GSS

[2]The income bracket for employees with disabilities was difficult to ascertain. A significant proportion of these participants received a combination of a government benefit and paid wages, meaning their average income remained fairly constant without and without employment. The minimum wage exception for people with disabilities allowed employers to pay below minimum wage. The rate of pay reflected employees' ability to carry out set work.

Table E 14 Condition of housing occupied by employees in comparison with New Zealand's general population derived from Statistics New Zealand 2018 general social survey (%).

	Condition of housing[1]				
	Immediate and extensive repairs/ maintenance	Immediate repairs/ maintenance	Some/minor repairs/ maintenance	No repairs/ maintenance needed	Don't know/prefer not to say
Stats NZ GSS 2018[2]	4.2	14.5	50.8	30.5	-
Employees prior to SE	12.9	7.5	32.3	39.8	7.5
Employees after SE	5.4	3.4	39.8	42.5	6.5

[1]Data not available from 2008-12 GSS CURF due to differing measurement scale.
[2]Data not available for the refused and don't know category.

Table E 15 Employees' housing and issues with coldness in comparison with New Zealand's general population derived from Statistics New Zealand 2018 general social survey (%).

	Issues with cold in housing[1]				
	Yes, always	Yes, often	Yes, sometimes	No, problem	DK/RF
Stats NZ GSS 2018	8.2	13.0	29.1	45.4	4.2[2]
Employees prior to SE	10.8	15.1	26.9	44.1	3.3
Employees after SE	8.6	8.6	23.7	53.8	5.4

[1]Data not available from 2008-12 GSS CURF due to differing measurement scale.
[2]Included respondents that had not been in the housing arrangement during winter.

Table E 16 Employees' housing and issues with dampness/mould in comparison with New Zealand's general population derived from Statistics New Zealand 2018 general social survey (%).

	Dampness/mould in housing[1]			
	Major problem	Minor problem	No problem	DK/RF
Stats NZ GSS 2018[2]	5.3	30.5	65.8	-
Employees prior to SE	10.8	28.0	58.1	3.2
Employees after to SE	4.3	23.7	65.6	6.5

[1]Data not available from 2008-12 GSS CURF due to differing measurement scale.
[2]Data unavailable for don't know and refused category.

Table E 17 Employees' highest qualification in comparison with New Zealand's general population derived from Statistics New Zealand 2018 GSS data (avg %).

	Highest qualification[1]				
	No qualification	School qualification	Vocational qualification	University qualification	Other
Stats NZ 2018 GSS	44.0	7.1	19.7	25.0	4.2
Employees prior to SE	39.8	35.5	21.5	3.2	0.0
Employees after the SE[2]	19.4	20.4	57.0	3.2	0.0

[1]The classification of highest qualification was guided by Statistics New Zealand education and training webpage (Statistics New Zealand, 2020). Vocational qualifications referred to any qualification received post-secondary school. These included pre-vocational certificates, bridging certificates, trade certificate, national certificate, advanced trade certificates, undergraduate diploma/certificate, national diploma, NZ diploma. University qualifications referred included bachelor's degrees and anything higher. Other qualifications refereed to overseas qualifications and any other qualification not listed by Stats NZ.

[2]Any qualification gained by an SE employee was considered a vocational qualification.

Appendix F

Wellbeing of Disabled Social Enterprise Employees' and New Zealand's Disabled and General Population

Table F 1 Disabled employees' overall life satisfaction in comparison with New Zealand's disabled and general population derived from Statistics New Zealand and 2008 and 2018 general social survey (%).

	Overall life satisfaction		
	0-6	7-8	9-10
Stats NZ GSS 2008 (Disabled)[1]	25.8	50.1	23.8
Stats NZ GSS 2008 (General)[1]	15.3	53.5	30.9
Stats NZ GSS 2018 (Disabled)[1]	35.2	38.7	26.0
Stats NZ GSS 2018 (General)[1]	18.9	49.3	31.9
Disabled Employees prior to SE	66.1	17.8	16.1
Disabled Employees after SE	21.0	27.5	51.6

[1]Different scales used in the surveys. Individuals that identified as 'very dissatisfied'; 'dissatisfied'; 'no feeling either way' were considered to have an overall life satisfaction score between 0-6. Individuals that identified as satisfied were considered to have an overall life satisfaction score between 7-8. Individuals that identified as very satisfied were considered to have an overall life satisfaction score between 9-10.

Table F 2 Disabled employees' self-rated health status in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2008 and 2018 general social survey (GSS) (%).

	Self-rated health status			
	Fair/poor	Good	Very Good	Excellent
Stats NZ GSS 2008 (Disabled)	33.6	27.1	25.9	13.4
Stats NZ GSS 2008 (General)	14.8	27.7	36.3	21.2
Stats NZ GSS 2018 (Disabled)	48.6	29.7	16.2	5.4
Stats NZ GSS 2018 (General)	14.7	30.0	38.8	16.5
Disabled Employees prior to SE[1]	33.8	30.6	27.4	8.1
Disabled Employees after SE[1]	14.5	35.5	33.9	16.1

[1]Fair/poor categories combined to facilitate comparison with the aggregated 2018 GSS data received from Statistics New Zealand.

Table F 3 Disabled employees' smoking status in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2008 and 2018 general social survey (%).

	Smoking status		
	Yes	No	DK/RF[1]
Stats NZ GSS 2008 (Disabled)	28.5	71.5	0.0
Stats NZ GSS 2008 (General)	20.5	79.4	0.1
Stats NZ GSS 2018 (Disabled)	19.9	80.1	-
Stats NZ GSS 2018 (General)	14.8	85.2	-
Disabled Employees prior to SE	22.6	77.4	0.0
Disabled Employees after SE	16.1	83.9	0.0

[1]Don't know and refused category data available with the 2008 GSS CURF microdata but unavailable for the 2018 GSS aggregated data.

Table F 4 Disabled employees' ability to express their identity in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2008 and 2018 general social survey (%).

	Ability to express identity					
	Very hard	Hard	Sometimes easy/hard	Easy	Very Easy	DK/RF[1]
Stats NZ GSS 2008 (Disabled)	1.6	3.6	16.1	41.4	36.2	1.0
Stats NZ GSS 2008 (General)	0.7	2.4	13.5	44.6	37.7	1.1
Stats NZ GSS 2018 (Disabled)	1.7	4.8	17.5	32	43.6	-
Stats NZ GSS 2018 (General)	0.4	1.5	14.2	33.5	50.3	-
Disabled Employees prior to SE	8.1	19.4	25.8	24.2	19.4	3.2
Disabled Employees after SE	6.5	1.6	35.5	27.4	27.4	1.6

[1]Don't know and refused category data available with the 2008 GSS CURF microdata but unavailable with the 2018 GSS aggregated data.

Table F 5 Disabled employees' voting status in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2008 and 2018 general social survey (%).

	Voting status		
	Yes	No	DK/RF[1]
Stats NZ GSS 2008 (Disabled)	78.0	21.8	0.2
Stats NZ GSS 2008 (General)	81.6	18.1	0.3
Stats NZ GSS 2018 (Disabled)	82.8	17.2	-
Stats NZ GSS 2018 (General)	81.5	18.5	-
Disabled Employees before SE	59.7	37.1	3.2
Disabled Employees after SE	71.0	27.4	1.6

[1]Data unavailable for the don't know/refused category in the 2018 GSS.

Table F 6 Disabled employees' level of trust in comparison with New Zealand's disabled and general population derived from Statistics New Zealand 2018 general social survey (%).

	Trust in others[1]				
	0-2	3-4	5-6	7-8	9-10
Stats NZ GSS 2018 (Disabled)	4.8	9.3	32.0	40.2	14.1
Stats NZ GSS 2018 (General)	1.9	4.1	28.1	50.8	15.1
Disabled Employees prior to SE	14.5	24.2	27.4	22.6	11.3
Disabled Employees after SE	3.2	11.3	37.1	22.6	25.8

[1]Data unavailable for 2008 GSS

Table F 7 Disabled employees' experience of discrimination in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2008 and 2018 general social survey (%).

	Experienced discrimination		
	Yes	No	DK/RF[1]
Stats NZ GSS 2008 (Disabled)	14.9	84.7	0.4
Stats NZ GSS 2008 (General)	9.4	90.3	0.3
Stats NZ GSS 2018 (Disabled)	22.8	76.8	-
Stats NZ GSS 2018 (General)	17.4	82.6	-
Disabled Employees prior to SE	19.4	75.8	4.8
Disabled Employees after SE	16.1	79.0	4.8

[1]Data not available for the don't know/refused category in the 2018 GSS.

Table F 8 Disabled employees' level of loneliness experienced in comparison with New Zealand's disabled and general population derived from Statistics New Zealand 2008 and 2018 general social survey (%).

	Loneliness				
	None of the time	A little of the time	Some of the time	Most/all of the Time	RF/DK[1]
Stats NZ GSS 2008 (Disabled)	53.5	16.5	19.7	9.4	0.8
Stats NZ GSS 2008 (General)	65.3	17.0	13.1	4.3	0.3
Stats NZ GSS 2018 (Disabled)	52.9	22.1	16.6	8.3	-
Stats NZ GSS 2018 (General)	61.0	22.4	13.1	3.5	-
Disabled Employees prior to SE	21.0	16.1	41.9	21.0	0.0
Disabled Employees after SE	50.0	19.4	21.0	9.7	0.0

[1]Data not available for those who refused to answer or didn't know.

Table F 9 Disabled employee's level of contact with family in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2018 general social survey (%).

	Contact with Family[1]					
	Everyday	At least once a week	Around Once a Fortnight	At least once in the last month	Not at all	RF/DK[2]
Stats NZ GSS 2018 (Disabled)	23.9	41.8	9.8	10.5	14.4	-
Stats NZ GSS 2018 (General)	20.1	40.5	11.6	11.3	16.4	-
Disabled Employees prior to SE	61.3	17.7	1.6	8.1	6.5	4.8
Disabled Employees after SE	46.8	21.0	3.2	12.9	9.7	6.5

[1]Data not available from 2008-12 GSS CURF due to different measurement scales
[2]Data not available for the don't know/refused category.

Table F 10 Disabled employees' level of contact with friends in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2018 general social survey (%).

	Friends Contact[1]					
	Everyday	At least once a week	Around Once a Fortnight	At least once in the last four weeks	Not at all	RF/DK[2]
Stats NZ GSS 2018 (Disabled)	20.0	47.6	8.3	12.1	12.4	-
Stats NZ GSS 2018 (General)	26.9	46.9	10.9	8.2	7.0	-
Disabled Employees prior to SE	17.7	32.3	19.4	8.1	22.6	0
Disabled Employees after SE	54.8	33.9	3.2	4.8	3.2	0

[1]Data not available from 2008-12 GSS CURF due to different measurement scales
[2]Data not available for the don't know/refused category.

Table F 11 Disabled employees' ability to get help in a crisis in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2008 general social survey (%).

	Can get help in a crisis[1]		
	Yes	No	RF/DK
Stats NZ GSS 2008 (Disabled)	93.6	5.4	1.0
Stats NZ GSS 2008 (General)	95.9	3.7	0.4
Disabled Employees prior to SE	85.5	9.7	4.8
Disabled Employees after SE	98.4	1.6	0.0

[1]No data available for 2018 GSS

Table F 12 Disabled employees' income sufficiency in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2008 and 2018 general social survey (%).

	Income sufficiency				
	Not enough	Only just enough	Enough	More than enough	DK/RF[1]
Stats NZ GSS 2008 (Disabled)	28.2	32.8	30.1	8.6	0.2
Stats NZ GSS 2008 (General)	15.1	33.4	38.3	13.0	0.2
Stats NZ GSS 2018 (Disabled)	18.0	34.6	35.6	12.1	-
Stats NZ GSS 2018 (General)	10.0	27.1	44.4	18.4	-
Disabled Employees prior to SE	27.4	32.3	27.4	12.9	0.0
Disabled Employees after SE	12.9	33.9	41.9	9.7	0.0

[1]Data not available for don't know/refused categories in the 2018 GSS.

Table F 13 Disabled employees' housing and issues with coldness in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2018 general social survey (%).

	House cold[1]				
	Yes, always	Yes, often	Yes, sometimes	No, problem	DK/RF
Stats NZ GSS 2018 (Disabled)	12.7	13.7	29.6	41.6	2.1[2]
Stats NZ GSS 2018 (General)	8.2	13.0	29.1	45.4	4.3[2]
Disabled Employees prior to SE	8.1	17.7	27.4	41.9	4.8
Disabled Employees after SE	8.1	9.7	25.8	51.6	4.8

[1]Data not available from 2008-12 GSS CURF due to differing measurement scale

[2]Included respondents that had not been in the housing arrangement during winter.

Table F 14 Condition of housing occupied by disabled employees in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2018 general social survey (%).

	Condition of housing[1]				
	Immediate and extensive repairs/ maintenance	Immediate repairs/ maintenance	Some/minor repairs/ maintenance	No repairs/ maintenance needed	Don't know/ prefer not to say[2]
Stats NZ GSS 2018 (Disabled)	7.6	17.2	42.1	33.1	-
Stats NZ GSS 2018 (General)	4.2	14.5	50.8	30.5	-
Disabled Employees prior to SE	11.3	8.1	30.6	40.3	9.7
Disabled Employees after SE	6.5	3.2	33.8	48.4	8.1

[1]Data not available from 2008-12 GSS CURF due to differing measurement scale
[2]Data not available for 2018 GSS.

Table F 15 Disabled Employees' housing and issues with dampness/mould in comparison with New Zealand's disabled and general population derived from Statistics New Zealand 2018 general social survey (%).

	Dampness in housing[1]			
	Major problem	Minor problem	No problem	DK/RF[2]
Stats NZ GSS 2018 (Disabled)	6.9	27.9	65.2	-
Stats NZ GSS 2018 (General)	3.6	30.5	65.8	-
Disabled Employees prior to SE	9.7	29.0	56.5	4.8
Disabled Employees after to SE	1.6	25.8	62.9	9.7

[1]Data not available from 2008-12 GSS CURF due to differing measurement scale
[2]Data not available for the 2018 GSS.

Table F 16 Disabled employees' highest qualification in comparison with New Zealand's disabled and general population from the Statistics New Zealand 2018 general social survey (%).

	Highest qualification[1]				
	No qualification	School qualification	Vocational qualification	University qualification	Other
Stats NZ GSS 2018 (Disabled)	59.4	4.5	20.5	11.1	4.2
Stats NZ GSS 2018 (General)	44.0	7.1	19.7	25.0	4.2
Disabled Employees prior to SE	48.4	35.5	14.5	1.6	0.0
Disabled Employees After the SE[2]	22.6	21.0	54.8	1.6	0.0

[1]The classification of highest qualification was guided by Statistics New Zealand education and training webpage (Statistics New Zealand, 2020). Vocational qualifications referred to any qualification received post-secondary school. These included pre-vocational certificates, bridging certificates, trade certificate, national certificate, advanced trade certificates, undergraduate diploma/certificate, national diploma, NZ diploma. University qualifications referred included bachelor's degrees and anything higher. Other qualifications refereed to overseas qualifications and any other qualification not listed by Stats NZ.

[2]Any qualification gained by an SE employee was considered a vocational qualification.

Appendix G

Multiple Linear Regression Models and Assumption Testing

G.1 Assessing employees' recalled subjective wellbeing before joining a social enterprise.

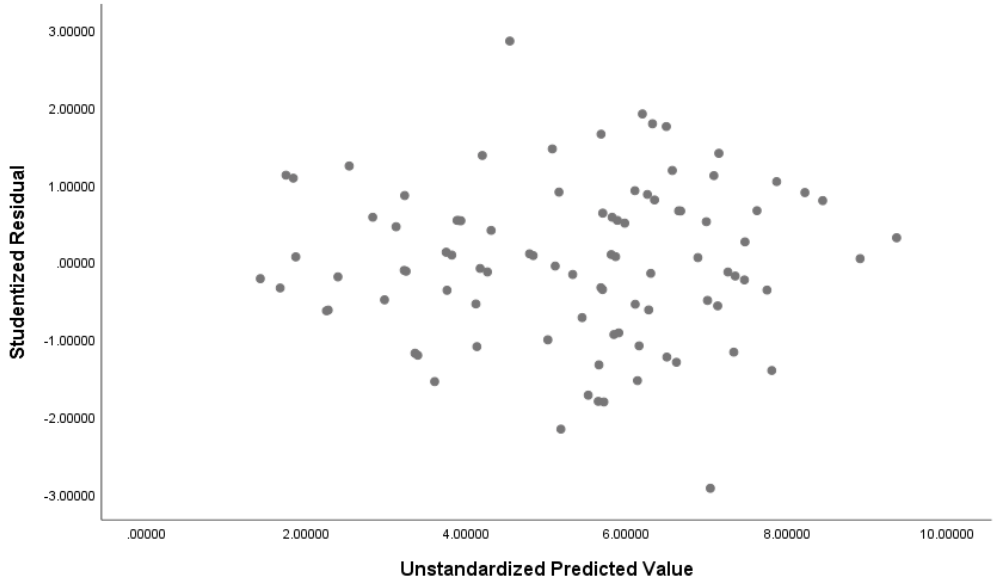

Figure G.1 1 Scatterplot showing the relationship between studentized residuals and unstandardised predicted values.

Table G.1 1 A correlation matrix using the spearman's rank-order correlation test to assess for multicollinearity between the variables.

		Life Sat	School	Vocational	Tertiary	Health	Identity	Trust	Loneliness	Income	Housing
Life satisfaction	Correlation Coefficient	1.000	0.000	0.028	-0.018	.425**	.343**	.441**	.392**	.400**	.211*
	Sig. (2-tailed)		0.997	0.792	0.868	0.000	0.001	0.000	0.000	0.000	0.045
	N	91	91	91	91	91	91	91	91	91	91
School qualifications	Correlation Coefficient	0.000	1.000	-.400**	-0.139	-0.053	-0.051	-0.068	0.032	-0.040	-0.020
	Sig. (2-tailed)	0.997		0.000	0.188	0.619	0.630	0.524	0.763	0.704	0.847
	N	91	91	91	91	91	91	91	91	91	91
Vocational qualifications	Correlation Coefficient	0.028	-.400**	1.000	-0.098	0.003	0.097	0.097	-0.077	0.003	-.238*
	Sig. (2-tailed)	0.792	0.000		0.355	0.977	0.358	0.361	0.465	0.976	0.023
	N	91	91	91	91	91	91	91	91	91	91
Tertiary qualifications	Correlation Coefficient	-0.018	-0.139	-0.098	1.000	0.126	.219*	0.189	-0.013	0.144	0.085
	Sig. (2-tailed)	0.868	0.188	0.355		0.236	0.037	0.072	0.900	0.173	0.426
	N	91	91	91	91	91	91	91	91	91	91
Health status	Correlation Coefficient	.425**	-0.053	0.003	0.126	1.000	.307**	.287**	.359**	0.113	0.162
	Sig. (2-tailed)	0.000	0.619	0.977	0.236		0.003	0.006	0.000	0.287	0.125
	N	91	91	91	91	91	91	91	91	91	91
Identity	Correlation Coefficient	.343**	-0.051	0.097	.219*	.307**	1.000	.439**	.286**	0.071	0.013
	Sig. (2-tailed)	0.001	0.630	0.358	0.037	0.003		0.000	0.006	0.501	0.900
	N	91	91	91	91	91	91	91	91	91	91
Trust	Correlation Coefficient	.441**	-0.068	0.097	0.189	.287**	.439**	1.000	.345**	0.176	0.172
	Sig. (2-tailed)	0.000	0.524	0.361	0.072	0.006	0.000		0.001	0.096	0.104
	N	91	91	91	91	91	91	91	91	91	91
Loneliness	Correlation Coefficient	.392**	0.032	-0.077	-0.013	.359**	.286**	.345**	1.000	0.106	.230*
	Sig. (2-tailed)	0.000	0.763	0.465	0.900	0.000	0.006	0.001		0.315	0.028
	N	91	91	91	91	91	91	91	91	91	91
Income necessities	Correlation Coefficient	.400**	-0.040	0.003	0.144	0.113	0.071	0.176	0.106	1.000	.347**
	Sig. (2-tailed)	0.000	0.704	0.976	0.173	0.287	0.501	0.096	0.315		0.001
	N	91	91	91	91	91	91	91	91	91	91
House condition	Correlation Coefficient	.211*	-0.020	-.238*	0.085	0.162	0.013	0.172	.230*	.347**	1.000

	Sig. (2-tailed)	0.045	0.847	0.023	0.426	0.125	0.900	0.104	0.028	0.001	
	N	91	91	91	91	91	91	91	91	91	91

**Correlation is significant at the 0.01 level (2-tailed).

*Correlation is significant at the 0.05 level (2-tailed).

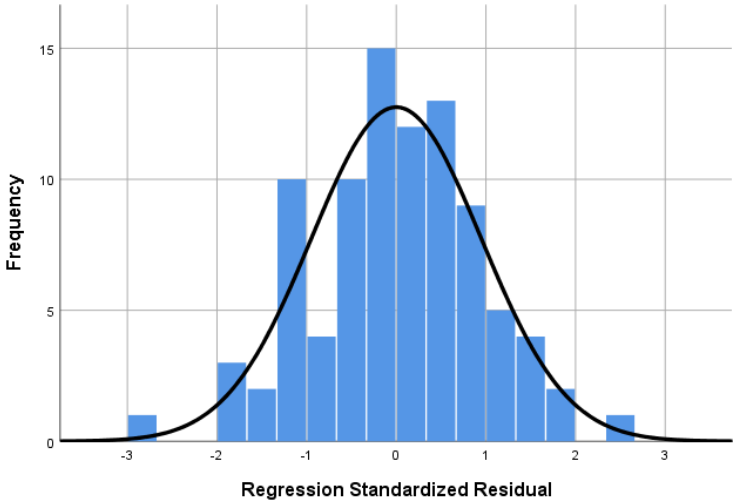

Figure G.1 2 Histogram showing standardised residuals with a with a superimposed normal curve.

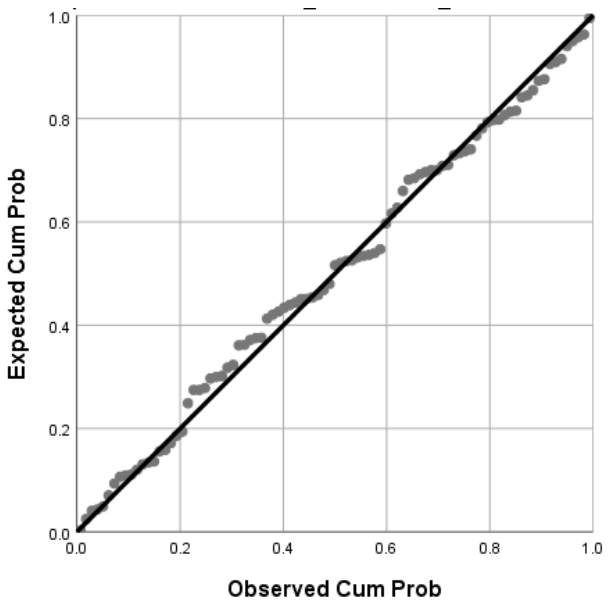

Figure G.1 3 A Normal P-P plot of regression standardised residuals used to assess for normality assumption.

G.2 Assessing employees' recalled subjective wellbeing before joining a social enterprise (socio-demographic variables).

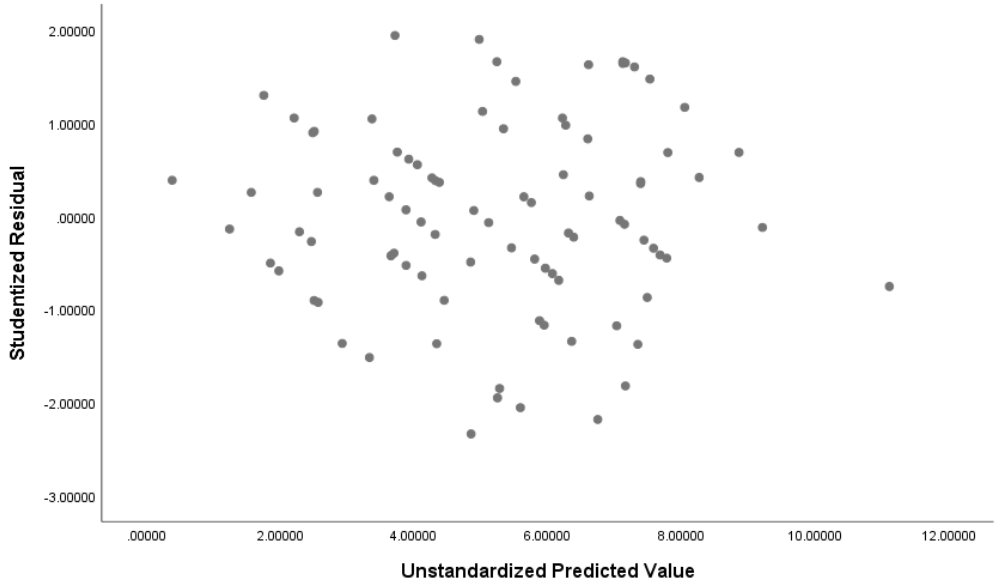

Figure G.2 1 Scatterplot showing the relationship between studentized residuals and unstandardised predicted values.

Table G.2 1 A correlation matrix using the spearman's rank-order correlation test to assess for multicollinearity between the variables.

		25-44	45-64	Gender	Disabled	Māori	Pasifika	Other	Life sat	School
Years 25-44	Correlation Coefficient	1.000	-.655**	-0.017	-.319**	0.037	-0.024	0.002	0.122	-0.049
	Sig. (2-tailed)		0.000	0.876	0.002	0.728	0.820	0.984	0.248	0.643
	N	91	91	91	91	91	91	91	91	91
Years 45-64	Correlation Coefficient	-.655**	1.000	-0.154	.392**	-0.016	0.045	-0.096	0.075	-0.190
	Sig. (2-tailed)	0.000		0.145	0.000	0.877	0.674	0.363	0.480	0.072
	N	91	91	91	91	91	91	91	91	91
Gender	Correlation Coefficient	-0.017	-0.154	1.000	-0.170	-0.131	-0.105	0.200	-0.058	0.159
	Sig. (2-tailed)	0.876	0.145		0.107	0.217	0.323	0.058	0.586	0.132
	N	91	91	91	91	91	91	91	91	91
Disabled	Correlation Coefficient	-.319**	.392**	-0.170	1.000	-.322**	0.124	-0.132	-0.032	0.012
	Sig. (2-tailed)	0.002	0.000	0.107		0.002	0.241	0.212	0.763	0.913
	N	91	91	91	91	91	91	91	91	91
Māori	Correlation Coefficient	0.037	-0.016	-0.131	-.322**	1.000	-0.203	-0.132	0.075	-0.088
	Sig. (2-tailed)	0.728	0.877	0.217	0.002		0.054	0.212	0.480	0.409
	N	91	91	91	91	91	91	91	91	91
Pasifika	Correlation Coefficient	-0.024	0.045	-0.105	0.124	-0.203	1.000	-0.089	-0.032	-0.069
	Sig. (2-tailed)	0.820	0.674	0.323	0.241	0.054		0.399	0.761	0.514
	N	91	91	91	91	91	91	91	91	91
Other	Correlation Coefficient	0.002	-0.096	0.200	-0.132	-0.132	-0.089	1.000	-0.003	-0.082
	Sig. (2-tailed)	0.984	0.363	0.058	0.212	0.212	0.399		0.979	0.442
	N	91	91	91	91	91	91	91	91	91
Life satisfaction	Correlation Coefficient	0.122	0.075	-0.058	-0.032	0.075	-0.032	-0.003	1.000	0.000
	Sig. (2-tailed)	0.248	0.480	0.586	0.763	0.480	0.761	0.979		0.997
	N	91	91	91	91	91	91	91	91	91
School qualifications	Correlation Coefficient	-0.049	-0.190	0.159	0.012	-0.088	-0.069	-0.082	0.000	1.000
	Sig. (2-tailed)	0.643	0.072	0.132	0.913	0.409	0.514	0.442	0.997	
	N	91	91	91	91	91	91	91	91	91
Vocational qualifications	Correlation Coefficient	.222*	-0.158	0.007	-.234*	0.150	-0.034	0.105	0.028	-.400**
	Sig. (2-tailed)	0.035	0.135	0.947	0.025	0.155	0.749	0.322	0.792	0.000
	N	91	91	91	91	91	91	91	91	91
Tertiary qualifications	Correlation Coefficient	.228*	-0.149	-0.098	-0.127	-0.101	-0.068	.226*	-0.018	-0.139
	Sig. (2-tailed)	0.030	0.158	0.357	0.230	0.340	0.519	0.032	0.868	0.188

	N	91	91	91	91	91	91	91	91	91
Health status	Correlation Coefficient	0.123	-0.062	0.070	-.216*	0.075	0.188	-0.113	.425**	-0.053
	Sig. (2-tailed)	0.244	0.561	0.509	0.040	0.482	0.075	0.284	0.000	0.619
	N	91	91	91	91	91	91	91	91	91
Identity	Correlation Coefficient	0.117	0.100	-0.063	-0.087	0.059	0.154	0.016	.343**	-0.051
	Sig. (2-tailed)	0.268	0.345	0.554	0.415	0.576	0.146	0.880	0.001	0.630
	N	91	91	91	91	91	91	91	91	91
Trust	Correlation Coefficient	0.123	0.060	-0.086	-0.129	0.020	0.186	0.043	.441**	-0.068
	Sig. (2-tailed)	0.245	0.572	0.418	0.224	0.854	0.078	0.688	0.000	0.524
	N	91	91	91	91	91	91	91	91	91
Loneliness	Correlation Coefficient	0.090	-0.011	-0.159	-0.117	-0.129	0.138	-0.155	.392**	0.032
	Sig. (2-tailed)	0.399	0.920	0.132	0.271	0.222	0.191	0.142	0.000	0.763
	N	91	91	91	91	91	91	91	91	91
Income necessities	Correlation Coefficient	-0.131	0.140	-0.026	0.075	-0.011	-0.005	-0.008	.400**	-0.040
	Sig. (2-tailed)	0.217	0.184	0.805	0.477	0.919	0.965	0.943	0.000	0.704
	N	91	91	91	91	91	91	91	91	91
House condition	Correlation Coefficient	-0.076	0.010	-0.123	0.044	-0.024	0.066	-0.085	.211*	-0.020
	Sig. (2-tailed)	0.474	0.926	0.244	0.680	0.822	0.532	0.421	0.045	0.847
	N	91	91	91	91	91	91	91	91	91

**Correlation is significant at the 0.01 level (2-tailed).

*Correlation is significant at the 0.05 level (2-tailed).

		Vocational	Tertiary	Health	Identity	Trust	Loneliness	Income	House
Years 25-44	Correlation Coefficient	.222*	.228*	0.123	0.117	0.123	0.090	-0.131	-0.076
	Sig. (2-tailed)	0.035	0.030	0.244	0.268	0.245	0.399	0.217	0.474
	N	91	91	91	91	91	91	91	91
Years 45-64	Correlation Coefficient	-0.158	-0.149	-0.062	0.100	0.060	-0.011	0.140	0.010
	Sig. (2-tailed)	0.135	0.158	0.561	0.345	0.572	0.920	0.184	0.926
	N	91	91	91	91	91	91	91	91
Gender	Correlation Coefficient	0.007	-0.098	0.070	-0.063	-0.086	-0.159	-0.026	-0.123
	Sig. (2-tailed)	0.947	0.357	0.509	0.554	0.418	0.132	0.805	0.244
	N	91	91	91	91	91	91	91	91
Disabled	Correlation Coefficient	-.234*	-0.127	-.216*	-0.087	-0.129	-0.117	0.075	0.044
	Sig. (2-tailed)	0.025	0.230	0.040	0.415	0.224	0.271	0.477	0.680
	N	91	91	91	91	91	91	91	91
Māori	Correlation Coefficient	0.150	-0.101	0.075	0.059	0.020	-0.129	-0.011	-0.024
	Sig. (2-tailed)	0.155	0.340	0.482	0.576	0.854	0.222	0.919	0.822
	N	91	91	91	91	91	91	91	91
Pasifika	Correlation Coefficient	-0.034	-0.068	0.188	0.154	0.186	0.138	-0.005	0.066
	Sig. (2-tailed)	0.749	0.519	0.075	0.146	0.078	0.191	0.965	0.532
	N	91	91	91	91	91	91	91	91
Other	Correlation Coefficient	0.105	.226*	-0.113	0.016	0.043	-0.155	-0.008	-0.085
	Sig. (2-tailed)	0.322	0.032	0.284	0.880	0.688	0.142	0.943	0.421
	N	91	91	91	91	91	91	91	91
Life satisfaction	Correlation Coefficient	0.028	-0.018	.425**	.343**	.441**	.392**	.400**	.211*
	Sig. (2-tailed)	0.792	0.868	0.000	0.001	0.000	0.000	0.000	0.045
	N	91	91	91	91	91	91	91	91
School qualifications	Correlation Coefficient	-.400**	-0.139	-0.053	-0.051	-0.068	0.032	-0.040	-0.020
	Sig. (2-tailed)	0.000	0.188	0.619	0.630	0.524	0.763	0.704	0.847
	N	91	91	91	91	91	91	91	91
Vocational qualifications	Correlation Coefficient	1.000	-0.098	0.003	0.097	0.097	-0.077	0.003	-.238*
	Sig. (2-tailed)		0.355	0.977	0.358	0.361	0.465	0.976	0.023
	N	91	91	91	91	91	91	91	91
Tertiary qualifications	Correlation Coefficient	-0.098	1.000	0.126	.219*	0.189	-0.013	0.144	0.085
	Sig. (2-tailed)	0.355		0.236	0.037	0.072	0.900	0.173	0.426
	N	91	91	91	91	91	91	91	91
Health status	Correlation Coefficient	0.003	0.126	1.000	.307**	.287**	.359**	0.113	0.162

	Sig. (2-tailed)	0.977	0.236		0.003	0.006	0.000	0.287	0.125
	N	91	91	91	91	91	91	91	91
Identity	Correlation Coefficient	0.097	.219*	.307**	1.000	.439**	.286**	0.071	0.013
	Sig. (2-tailed)	0.358	0.037	0.003		0.000	0.006	0.501	0.900
	N	91	91	91	91	91	91	91	91
Trust	Correlation Coefficient	0.097	0.189	.287**	.439**	1.000	.345**	0.176	0.172
	Sig. (2-tailed)	0.361	0.072	0.006	0.000		0.001	0.096	0.104
	N	91	91	91	91	91	91	91	91
Loneliness	Correlation Coefficient	-0.077	-0.013	.359**	.286**	.345**	1.000	0.106	.230*
	Sig. (2-tailed)	0.465	0.900	0.000	0.006	0.001		0.315	0.028
	N	91	91	91	91	91	91	91	91
Income necessities	Correlation Coefficient	0.003	0.144	0.113	0.071	0.176	0.106	1.000	.347**
	Sig. (2-tailed)	0.976	0.173	0.287	0.501	0.096	0.315		0.001
	N	91	91	91	91	91	91	91	91
House condition	Correlation Coefficient	-.238*	0.085	0.162	0.013	0.172	.230*	.347**	1.000
	Sig. (2-tailed)	0.023	0.426	0.125	0.900	0.104	0.028	0.001	
	N	91	91	91	91	91	91	91	91

**Correlation is significant at the 0.01 level (2-tailed).

*Correlation is significant at the 0.05 level (2-tailed).

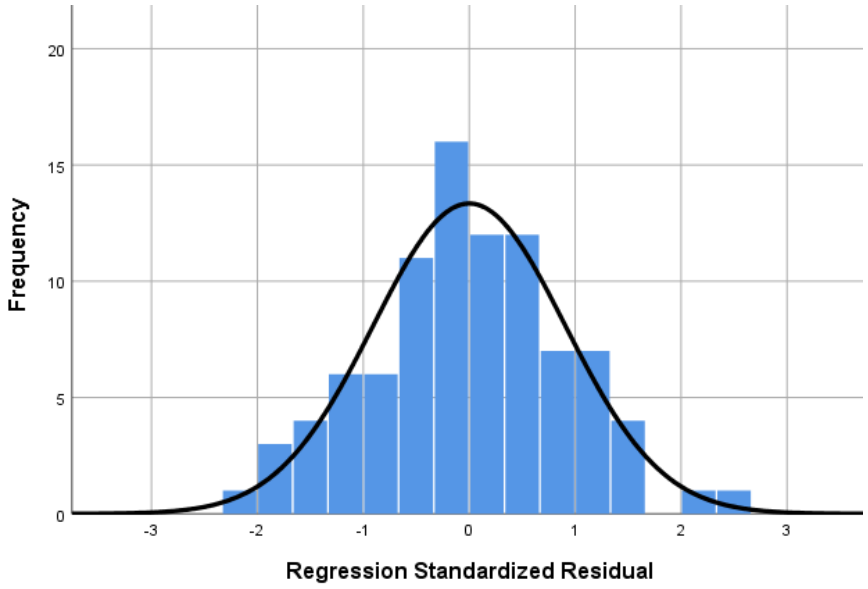

Figure G.2 2 Histogram showing frequency of standardised residuals with a superimposed normal curve.

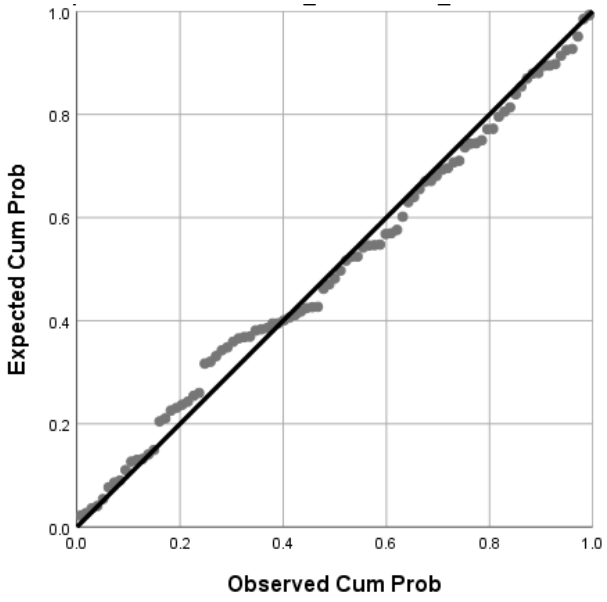

Figure G.2 3 A Normal P-P plot of regression standardised residuals used to assess for normality assumption.

G.3 Related sample sign-test assessing difference of medians between employees' reported overall life satisfaction.

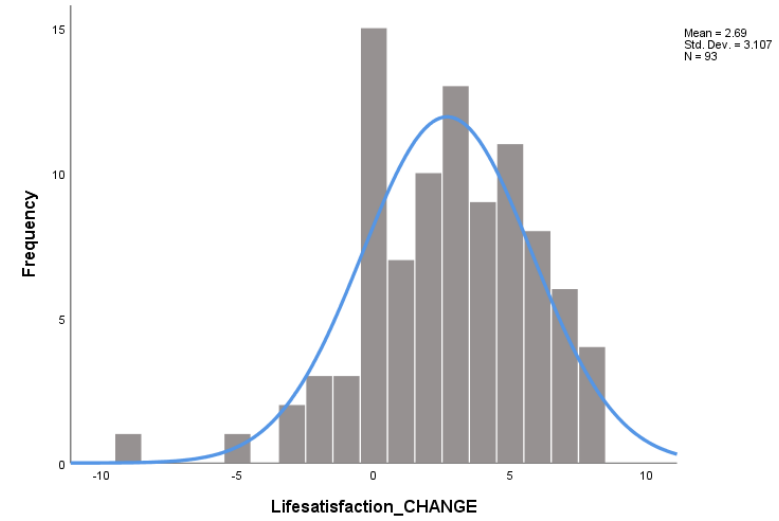

Figure G.3 1 Histogram with superimposed normal distribution curve showing change in the overall life satisfaction experienced by individuals after joining their respective SE organisation.

G.4 Assessing changes in employees' subjective wellbeing after joining a social enterprise.

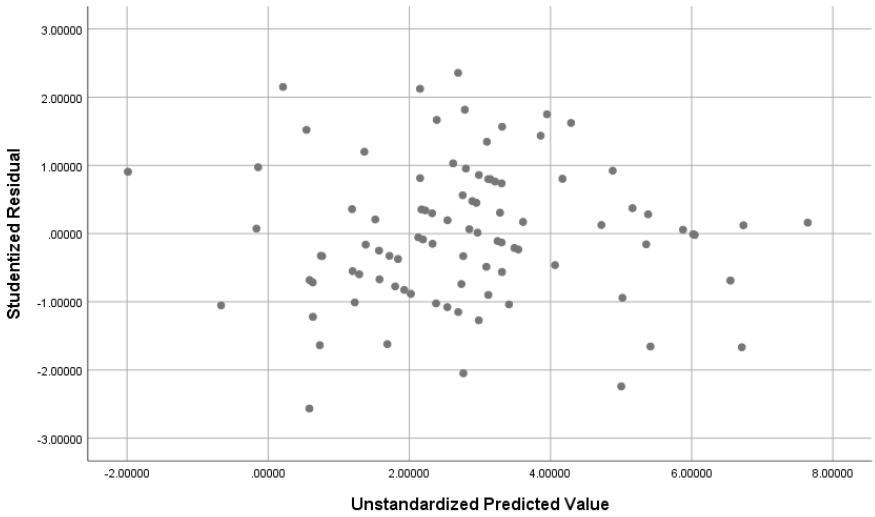

Figure G.4 1 Scatterplot showing the relationship between studentized residuals and unstandardised predicted values.

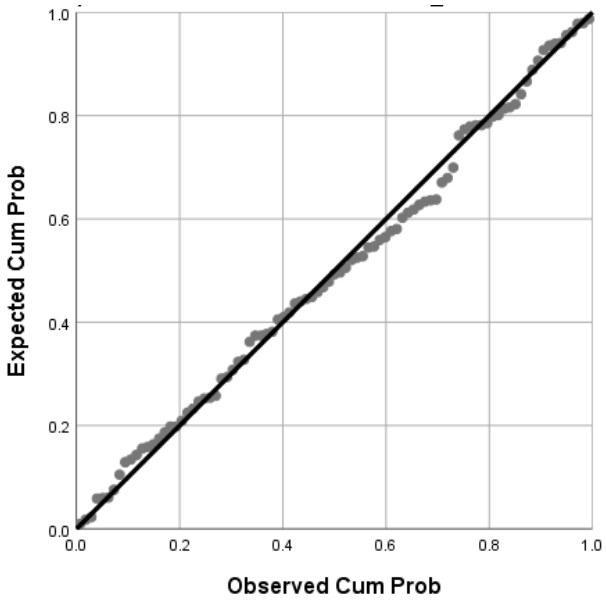

Figure G.4 2 Normal P-P plot of regression standardised residuals used to assess for normality assumption.

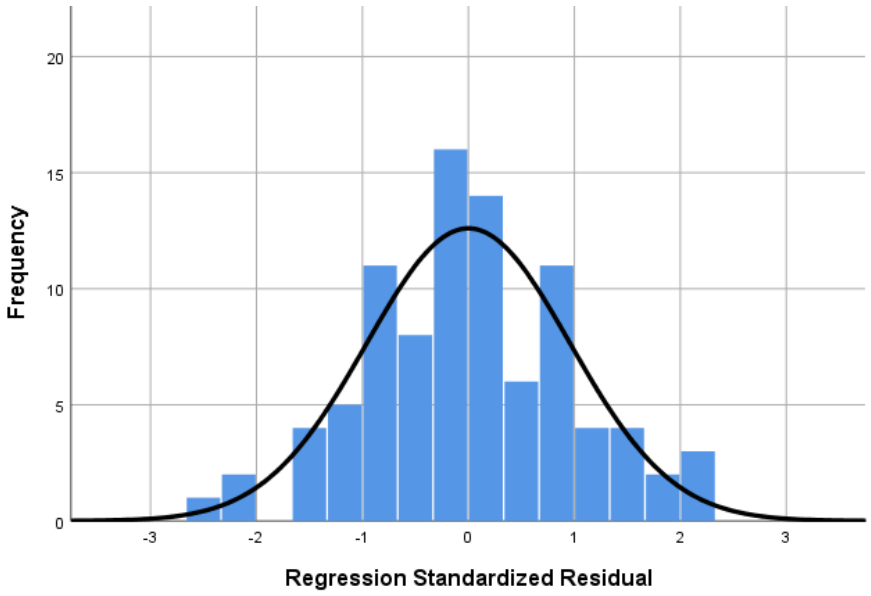

Figure G.4 3 Histogram showing frequency of standardised residuals with a superimposed normal curve

Table G.4 1 A correlation matrix using the spearman's rank-order correlation test to assess for multicollinearity between variables

		Life sat	Education	Health	Identity	Trust	Loneliness	Income	House
Life satisfaction	Correlation Coefficient	1.000	0.008	0.204	0.103	.535**	.288**	.212*	0.141
	Sig. (2-tailed)		0.939	0.053	0.333	0.000	0.006	0.043	0.184
	N	91	91	91	91	91	91	91	91
Education	Correlation Coefficient	0.008	1.000	0.139	-0.001	0.167	0.054	0.137	0.166
	Sig. (2-tailed)	0.939		0.187	0.993	0.114	0.613	0.196	0.115
	N	91	91	91	91	91	91	91	91
Health	Correlation Coefficient	0.204	0.139	1.000	.252*	0.196	.338**	0.033	0.069
	Sig. (2-tailed)	0.053	0.187		0.016	0.063	0.001	0.757	0.519
	N	91	91	91	91	91	91	91	91
Identity	Correlation Coefficient	0.103	-0.001	.252*	1.000	.407**	.212*	0.117	-0.047
	Sig. (2-tailed)	0.333	0.993	0.016		0.000	0.043	0.270	0.658
	N	91	91	91	91	91	91	91	91
Trust	Correlation Coefficient	.535**	0.167	0.196	.407**	1.000	.220*	0.092	0.073
	Sig. (2-tailed)	0.000	0.114	0.063	0.000		0.036	0.385	0.494
	N	91	91	91	91	91	91	91	91
Loneliness	Correlation Coefficient	.288**	0.054	.338**	.212*	.220*	1.000	0.031	0.124
	Sig. (2-tailed)	0.006	0.613	0.001	0.043	0.036		0.767	0.241
	N	91	91	91	91	91	91	91	91
Income necessities	Correlation Coefficient	.212*	0.137	0.033	0.117	0.092	0.031	1.000	0.205
	Sig. (2-tailed)	0.043	0.196	0.757	0.270	0.385	0.767		0.052
	N	91	91	91	91	91	91	91	91
House condition	Correlation Coefficient	0.141	0.166	0.069	-0.047	0.073	0.124	0.205	1.000
	Sig. (2-tailed)	0.184	0.115	0.519	0.658	0.494	0.241	0.052	
	N	91	91	91	91	91	91	91	91

**Correlation is significant at the 0.01 level (2-tailed).

*Correlation is significant at the 0.05 level (2-tailed).

G.5 Assessing changes in employees' subjective wellbeing after joining a social enterprise (socio-demographic and employment variables).

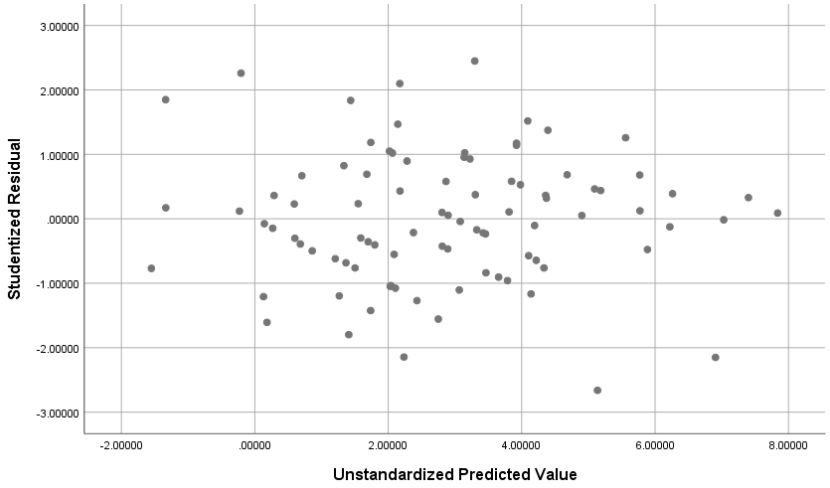

Figure G.5 1 Scatterplot showing the relationship between studentized residuals and unstandardised predicted values.

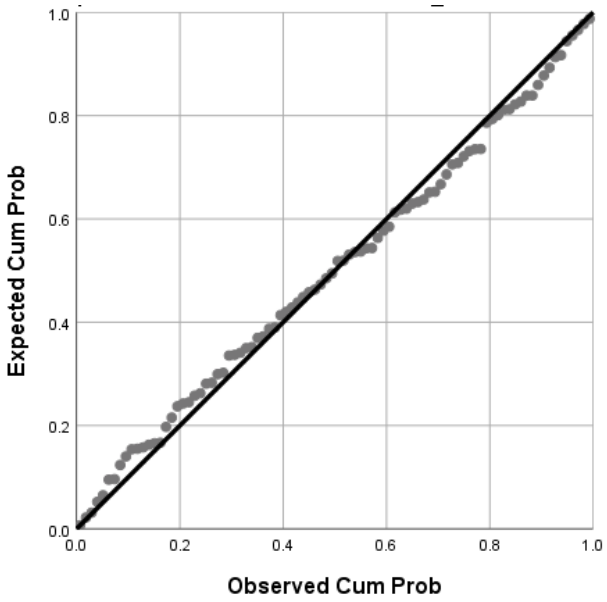

Figure G.5 2 A Normal P-P plot of regression standardised residuals used to assess for normality assumption.

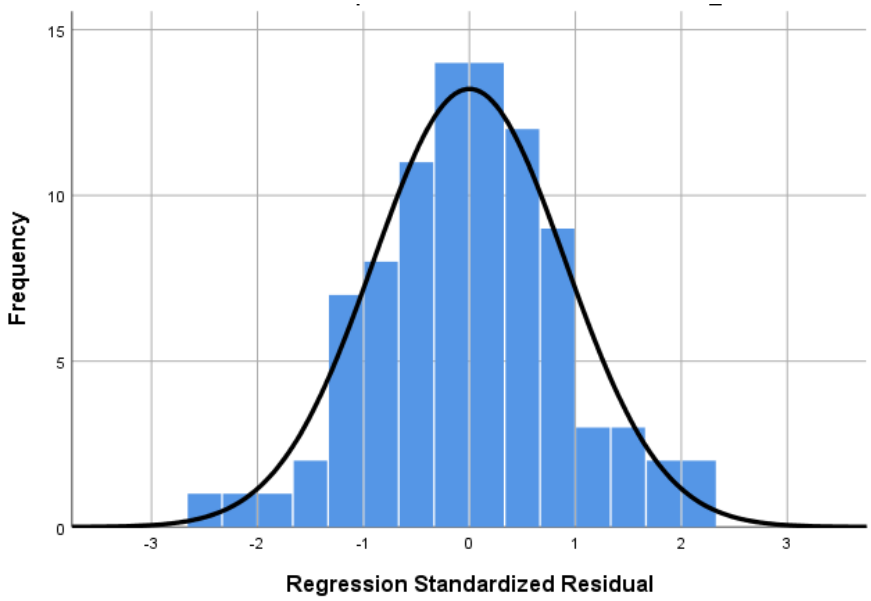

Figure G.5 3 Histogram showing frequency of standardised residuals with a superimposed normal curve

Table G.5 1 A correlation matrix using the spearman's rank-order correlation test to assess for multicollinearity between variables.

		25-44	45-64	Gender	Disabled	Māori	Pacfika	Other	Prior employ	Years worked
Years 25-44	Correlation Coefficient	1.000	-.651**	-0.047	-.333**	0.045	0.008	0.006	-0.094	0.043
	Sig. (2-tailed)		0.000	0.663	0.001	0.674	0.940	0.959	0.378	0.689
	N	91	91	91	91	91	91	91	91	91
Years 45-64	Correlation Coefficient	-.651**	1.000	-0.120	.401**	-0.021	0.000	-0.099	0.155	0.063
	Sig. (2-tailed)	0.000		0.258	0.000	0.841	1.000	0.353	0.145	0.555
	N	91	91	91	91	91	91	91	91	91
Male	Correlation Coefficient	-0.047	-0.120	1.000	-0.162	-0.139	-0.072	0.198	.255*	0.117
	Sig. (2-tailed)	0.663	0.258		0.126	0.190	0.499	0.061	0.015	0.272
	N	91	91	91	91	91	91	91	91	91
Disabled	Correlation Coefficient	-.333**	.401**	-0.162	1.000	-.319**	0.107	-0.130	-.334**	0.060
	Sig. (2-tailed)	0.001	0.000	0.126		0.002	0.313	0.220	0.001	0.572
	N	91	91	91	91	91	91	91	91	91
Māori	Correlation Coefficient	0.045	-0.021	-0.139	-.319**	1.000	-0.195	-0.134	0.083	-0.030
	Sig. (2-tailed)	0.674	0.841	0.190	0.002		0.065	0.209	0.439	0.780
	N	91	91	91	91	91	91	91	91	91
Pasfika	Correlation Coefficient	0.008	0.000	-0.072	0.107	-0.195	1.000	-0.086	-0.032	-0.005
	Sig. (2-tailed)	0.940	1.000	0.499	0.313	0.065		0.422	0.768	0.964
	N	91	91	91	91	91	91	91	91	91
Other	Correlation Coefficient	0.006	-0.099	0.198	-0.130	-0.134	-0.086	1.000	0.124	-.241*
	Sig. (2-tailed)	0.959	0.353	0.061	0.220	0.209	0.422		0.243	0.022
	N	91	91	91	91	91	91	91	91	91
Prior employment	Correlation Coefficient	-0.094	0.155	.255*	-.334**	0.083	-0.032	0.124	1.000	0.020
	Sig. (2-tailed)	0.378	0.145	0.015	0.001	0.439	0.768	0.243		0.854
	N	91	91	91	91	91	91	91	91	91
Years worked	Correlation Coefficient	0.043	0.063	0.117	0.060	-0.030	-0.005	-.241*	0.020	1.000
	Sig. (2-tailed)	0.689	0.555	0.272	0.572	0.780	0.964	0.022	0.854	
	N	91	91	91	91	91	91	91	91	91
Life satisfaction	Correlation Coefficient	-0.111	-0.083	-0.065	0.135	-0.030	0.155	-0.043	-0.175	0.174

	Sig. (2-tailed)	0.298	0.436	0.543	0.205	0.782	0.145	0.686	0.098	0.102
	N	91	91	91	91	91	91	91	91	91
Education	Correlation Coefficient	-0.160	.281**	0.126	0.187	-0.080	-0.123	-0.067	0.100	0.047
	Sig. (2-tailed)	0.131	0.007	0.237	0.077	0.455	0.247	0.533	0.349	0.660
	N	91	91	91	91	91	91	91	91	91
Health	Correlation Coefficient	-0.083	0.084	-0.101	0.199	0.092	0.009	-0.151	-0.160	0.056
	Sig. (2-tailed)	0.436	0.433	0.346	0.061	0.391	0.935	0.155	0.133	0.600
	N	91	91	91	91	91	91	91	91	91
Identity	Correlation Coefficient	-0.090	-0.043	-0.039	-0.016	0.152	-.250*	-0.180	-0.114	0.027
	Sig. (2-tailed)	0.399	0.686	0.718	0.882	0.152	0.017	0.090	0.287	0.802
	N	91	91	91	91	91	91	91	91	91
Trust	Correlation Coefficient	-0.064	-0.151	0.134	-0.018	0.036	-0.066	-0.047	-0.092	0.001
	Sig. (2-tailed)	0.551	0.157	0.208	0.868	0.733	0.535	0.658	0.389	0.992
	N	91	91	91	91	91	91	91	91	91
Loneliness	Correlation Coefficient	-0.095	0.054	-0.090	0.126	0.193	-0.141	-0.094	-0.099	0.028
	Sig. (2-tailed)	0.375	0.614	0.399	0.238	0.068	0.185	0.379	0.352	0.790
	N	91	91	91	91	91	91	91	91	91
Income necessities	Correlation Coefficient	-0.042	-0.010	0.018	-0.137	0.125	-0.118	-0.119	0.071	0.103
	Sig. (2-tailed)	0.696	0.929	0.868	0.198	0.241	0.267	0.263	0.509	0.336
	N	91	91	91	91	91	91	91	91	91
House condition	Correlation Coefficient	-0.013	0.116	0.034	0.000	-0.027	-0.042	-0.078	0.026	0.205
	Sig. (2-tailed)	0.906	0.275	0.748	0.996	0.801	0.692	0.467	0.810	0.052
	N	91	91	91	91	91	91	91	91	91

**Correlation is significant at the 0.01 level (2-tailed).

*Correlation is significant at the 0.05 level (2-tailed).

		Life sati	Education	Health	Identity	Trust	Loneliness	Income	House
Years 25-44	Correlation Coefficient	-0.111	-0.160	-0.083	-0.090	-0.064	-0.095	-0.042	-0.013
	Sig. (2-tailed)	0.298	0.131	0.436	0.399	0.551	0.375	0.696	0.906
	N	91	91	91	91	91	91	91	91
Years 45-64	Correlation Coefficient	-0.083	.281**	0.084	-0.043	-0.151	0.054	-0.010	0.116
	Sig. (2-tailed)	0.436	0.007	0.433	0.686	0.157	0.614	0.929	0.275
	N	91	91	91	91	91	91	91	91
Male	Correlation Coefficient	-0.065	0.126	-0.101	-0.039	0.134	-0.090	0.018	0.034
	Sig. (2-tailed)	0.543	0.237	0.346	0.718	0.208	0.399	0.868	0.748
	N	91	91	91	91	91	91	91	91
Disabled	Correlation Coefficient	0.135	0.187	0.199	-0.016	-0.018	0.126	-0.137	0.000
	Sig. (2-tailed)	0.205	0.077	0.061	0.882	0.868	0.238	0.198	0.996
	N	91	91	91	91	91	91	91	91
Māori	Correlation Coefficient	-0.030	-0.080	0.092	0.152	0.036	0.193	0.125	-0.027
	Sig. (2-tailed)	0.782	0.455	0.391	0.152	0.733	0.068	0.241	0.801
	N	91	91	91	91	91	91	91	91
Pasfika	Correlation Coefficient	0.155	-0.123	0.009	-.250*	-0.066	-0.141	-0.118	-0.042
	Sig. (2-tailed)	0.145	0.247	0.935	0.017	0.535	0.185	0.267	0.692
	N	91	91	91	91	91	91	91	91
Other	Correlation Coefficient	-0.043	-0.067	-0.151	-0.180	-0.047	-0.094	-0.119	-0.078
	Sig. (2-tailed)	0.686	0.533	0.155	0.090	0.658	0.379	0.263	0.467
	N	91	91	91	91	91	91	91	91
Prior employment	Correlation Coefficient	-0.175	0.100	-0.160	-0.114	-0.092	-0.099	0.071	0.026
	Sig. (2-tailed)	0.098	0.349	0.133	0.287	0.389	0.352	0.509	0.810
	N	91	91	91	91	91	91	91	91
Years worked	Correlation Coefficient	0.174	0.047	0.056	0.027	0.001	0.028	0.103	0.205
	Sig. (2-tailed)	0.102	0.660	0.600	0.802	0.992	0.790	0.336	0.052
	N	91	91	91	91	91	91	91	91
Life satisfaction	Correlation Coefficient	1.000	0.006	.255*	0.140	.533**	.298**	.208*	0.163
	Sig. (2-tailed)		0.955	0.015	0.190	0.000	0.004	0.049	0.125

	N	91	91	91	91	91	91	91	91
Education	Correlation Coefficient	0.006	1.000	0.137	-0.004	0.170	0.023	0.140	0.181
	Sig. (2-tailed)	0.955		0.199	0.968	0.108	0.831	0.189	0.088
	N	91	91	91	91	91	91	91	91
Health	Correlation Coefficient	.255*	0.137	1.000	.230*	0.178	.379**	0.016	0.022
	Sig. (2-tailed)	0.015	0.199		0.029	0.093	0.000	0.879	0.834
	N	91	91	91	91	91	91	91	91
Identity	Correlation Coefficient	0.140	-0.004	.230*	1.000	.412**	0.202	0.120	-0.051
	Sig. (2-tailed)	0.190	0.968	0.029		0.000	0.056	0.260	0.635
	N	91	91	91	91	91	91	91	91
Trust	Correlation Coefficient	.533**	0.170	0.178	.412**	1.000	0.190	0.111	0.107
	Sig. (2-tailed)	0.000	0.108	0.093	0.000		0.072	0.298	0.316
	N	91	91	91	91	91	91	91	91
Loneliness	Correlation Coefficient	.298**	0.023	.379**	0.202	0.190	1.000	0.006	0.135
	Sig. (2-tailed)	0.004	0.831	0.000	0.056	0.072		0.959	0.204
	N	91	91	91	91	91	91	91	91
Income necessities	Correlation Coefficient	.208*	0.140	0.016	0.120	0.111	0.006	1.000	.229*
	Sig. (2-tailed)	0.049	0.189	0.879	0.260	0.298	0.959		0.030
	N	91	91	91	91	91	91	91	91
House condition	Correlation Coefficient	0.163	0.181	0.022	-0.051	0.107	0.135	.229*	1.000
	Sig. (2-tailed)	0.125	0.088	0.834	0.635	0.316	0.204	0.030	
	N	91	91	91	91	91	91	91	91

**Correlation is significant at the 0.01 level (2-tailed).

*Correlation is significant at the 0.05 level (2-tailed).

Appendix H

Employees' Responses to the Open-Ended Questions

H.1.1 What would you be doing if you did not work at the social enterprise?

"[I'd be] On the benefit and [I'd be] very depressed. I had applied for 100 jobs [before employment at the SE] and got one interview and it was a no".

"Not working. I don't have any qualifications so probably wouldn't be able to find work".

"I would be sitting at home doing nothing. I wouldn't have a job. I have asked for jobs in the past, but they would say 'thank you for coming but you're not what we're looking for'".

"I'd still be volunteering at the hospice shop".

"I don't have any qualifications so I probably wouldn't be able to find work".

"I had approached a lot of organisations but none of them had work for me. It was really hard to find work".

"I'd probably be working as a volunteer at a charitable business or searching for work. I've attempted to apply for a number of jobs but there has always been people better suited to the position".

"I had applied for many jobs and got one interview and it was a no".

"[I'd be] working hopefully but there are not many opportunities for people in the far north. Especially young people with no work experience".

"I'd be at WINZ looking for a job. [But there were] no opportunities available for me then or probably now".

"I'd still be on the benefit. I'd just be at home by myself doing stuff around the house. I wouldn't have a routine or job".

"I'd be sitting at home watching TV. There are no opportunities for work [outside SE organisation]".

"I'd try to work at [….] but I'd struggle to work without references. My past has held me back and I've had less opportunities as a result".

“I’d probably be on the benefit and not working. When I was on the benefit I would waste [my money] on drink, drugs, pokies and just generally be bored”.

“I’d just be smoking a lot of pot and not doing anything”.

“[I’d be] bored stiff at home not doing anything”.

“I’d be at home doing odd jobs around there”.

“I’d be bored and wouldn’t have a job”.

“I’d probably be at home, playing games and being bored out of my mind”.

“I’d probably be doing nothing at home which would not be a good feeling”.

“I’d be dairy farming”.

“[I’d be] gaming”.

“I’d be working temp jobs somewhere”.

“I’d be driving trucks for Mainfreight”.

“I’d probably be working in the army or building. I’d like to get some business skills and education. Not having any is stopping me reach my full potential”.

“I’d probably be working at an engineering place”.

“I’d be working somewhere labouring hourly for minimum wage. [I would be] not feeling great and feeling depressed. It is a loop doing the same thing over and over again”.

“I’d be on the benefit or maybe working part time somewhere, but I wouldn’t be enjoying it. This place [social enterprise] understands me and they listen to my problems and help out”.

“[I’d be] driving forklifts and working more hours to meet my needs”.

“I’d still be working at […] but they didn’t treat us well and didn’t pay us well”.

“I would just be playing computer games all day”.

“I’m not too sure. I’d probably be unemployed. I had approached a lot of organisations but none of them had work for me. It was really hard to find work”.

“I’d probably be [unemployed] working at home in my garden”.

“I’d be sitting at home being bored. Jobs aren’t easy to find nowadays”.

I’d be trying to find work. I’d like to try working at the supermarket stacking shelves or pushing trolleys”.

I’d be doing nothing. [I’d be] trying to work but would face a lot of barriers because of my physical impairments”.

“Hopefully I’d have another job that would pay a bit more. WINZ [Work and Income New Zealand] won’t let you go over the minimum wage. [However] it is good to keep your benefit, so you have something to fall back on in case you lose your job”.

“I’d be at home and depressed”.

“I’d be trying to work in viticulture or on fishing boats, but I’d struggle to work without references. My past has held me back and I’ve had less opportunities as a result. My past has held me back and I’ve had less opportunities as a result. I can finally get a good reference which means I’ve got the opportunity to work somewhere else as well”.

“Nothing, I’d be on the benefit”.

“I don’t know. Probably not working”.

“I’d be helping people somehow or just be at home”.

“I’d probably be sitting at home. Not many opportunities available for me.”

“I don’t know. I’d be looking for work. I don’t have the skills to do jobs in the modern workplace. I would need to do some software courses to upskill, but there are not many opportunities to do this”.

“I’d be looking for work. But there are no opportunities for people with disabilities to get work though.”

I’d still be working at [organisation name] but they didn’t treat us well and didn’t pay us well”.

“I’d got to work and income. I wouldn’t have a job. I probably would like to take courses in construction roofing”.

“I’d be looking for jobs or working for my dad”.

H.1.2 What has been the most value impact (s) on your life since working at the social enterprise?

“The biggest impact on my life] is having a sense of purpose. I have a reason to get out of bed. I have something to look forward to when I wake up.”

“The job provided me with direction, stability and sense of purpose.”

“Enjoy waking up to go to work and having purpose is the biggest impact.”

“[The biggest impact on my life has been] getting a sense of worth and improved self-esteem. [The job] snapped me out of depression and anxiety.”

“My anxiety/depression has decreased which has allowed me to get off two lots of medications.”

“[The biggest impact on my life] has been getting my confidence. Before I came here, I had terrible confidence. I open up to people as a result e.g., with my supervisors. I’ve opened up more here [SE organisation]. I never used to before I worked here.”

“I’m giving money to family who are in need of it. This has given me a sense of purpose.”

“I feel a lot more valued.”

“One of the biggest impacts on my life is having a lot of friends here that are like me. I don’t feel as alone when I’m working here because people are just like me.”

“I like it here because I’ve got friends. There were no people/friends to hang out with when I wasn't working at [SE organisation].”

“The people at work are my family. At my previous job I was isolated/lonely but at this job I have people who are really supportive of me.”

“[I have] developed good social relationships with work colleagues.”

“The biggest impact [SE organisation] has had on my life is being with people. It brings comfort. I help fellow employees when they’re down. I try my best to help them. It makes me feel happy.”

“Meeting different people who have disabilities. [I] have made more friends. I have way more friends now that I did prior to starting. I’ve been able to go out with people from [SE organisation].”

“Going on trips with people from [SE organisation]. I didn’t do this stuff before I worked here. Last July we went to some police and fire stations. That’s still fresh in my mind.”

“I’ve got friends are at [SE organisation] and I hang out with them after work.”

“[Working] helped me to socialise more at work and outside work.”.

“[The biggest impact on my life has been] them [SE organisation] giving me a forklift licence.”

“I’ve also sat a course to get my forklift license.”

“Last week I applied for a forklift job which was a big opportunity for me, I wouldn’t have had that otherwise.

“[The biggest impact on my life has been] the education opportunities. They [SE organisation] understand people with disabilities. I’ve been able to start a course. The teachers are understanding of my disability.”

“I got kicked out of school early. They tagged me/stereotyped me and tried to put me in a box. [I] got stood down from school at 15. I started working not too long after that. This job has supported me on and off for 8 years. They listen to me. I can take things to the boss.”

“I’m doing a literacy/numeracy course at the moment here which is really helping me.”

“You get set goals and you get qualifications so that you can go back into the workforce.”

“They [SE organisation] pulled my life back on track. They offered me a job after my visa ran out. Now I can apply for other jobs. Last week I applied for a forklift job which was a big opportunity for me, I wouldn’t have had that otherwise.”

“I’d be trying to work at viticulture/fishing boats, but I’d struggle to work without references. My past has held me back and I’ve had less opportunities as a result. I can finally get a good reference which means I’ve got the opportunity to work somewhere else as well.”

“I’m stoked to have a job. [SE organisation] took me on despite my criminal record and have given me the opportunity to work. It has helped with my initiative and helped me pay my bills/debts and child support.”

“[SE organisation] has opened my eyes and supported me from the start. They gave me a chance despite my criminal record. I wouldn’t be working without that first chance.”

“I was in prison before this and [SE organisation] gave me the opportunity to work.”

“There are no job opportunities for people with disabilities. The job makes me get up in the morning and knowing I’ve got something to do.”

“[The job] brought me up a lot financially. I now can buy better quality food for me and my family.”

“The extra income has been a great help. It helped me catch up on debts to the bank, and pay them off.”

“[One of the biggest impacts on my life] has been the money earnt. It has helped with day to day living. This has helped to keep car on road, look after the car and buy food.”

“The job has given a lot of security financially. [I] can be more financially independent, and given the opportunity to buy food, clothing etc.”

“The wages mean that I don’t worry about bills and have stopped stressing about them.”

“[I’ve] saved and brought a mountain bike which I couldn’t have afforded if I wasn’t working here.”

“I feel lucky to get a job. I’ve got savings for things I need e.g., for groceries and fuel.”

“Earning money has helped to save for stuff. I’ve brought a gaming console + games. It would’ve taken me years to get them if I wasn’t working here [at Altus].”

The far north has got high unemployment and not many opportunities. Getting a job at [SE organisation] has enabled me to save money. I now have the opportunity to save money, and to move out of [town name] and pursue other employment opportunities [….].

“Being able to save for a personal training degree. Helps with buying laptop to do online courses.”

“The wages mean that I don’t worry about bills and have stopped stressing about them. I look forward to work and have a sense of purpose. [Employment] has given me money which has given me opportunities to travel (Fiji/Aussie), buy cars, go to concerts e.g., SIX60. I’m saving for maintenance on home and would like to buy a Bach.”

“I’m using money to pay for computer courses and am getting a qualification. Saving for a trip overseas.”

“I can now pay a mortgage off, so I brought a house. I couldn’t have done this before.”

“I like to be able to earn money rather than being handed money out.”

“Not being on a benefit makes me feel more honest and the kids feel better about themselves. [There is a] sense of pride in earning my keep.”

“It makes me feel good that I earn money. A lot of my family are on the benefit.”

“It feels nice to earn money. Benefit money feels lazy.”

“The biggest impact for me is having the freedom to express myself safely and be myself [as a person with a disability]. They [SE] have given me the opportunity to do things, and allowed me to work, and be the best I can be.”

“[The biggest impact on my life] is being able to trust people more. I couldn’t trust people before working at [SE organisation]. I was a 1 on the trust scale.”

“I feel a lot more valued. They have looked after me. I trust them. I have issues trusting people.”