



SURVEY QUESTIONS

These survey questions are provided to assist you in preparing data on your organization's support for social enterprises in advance of completing the survey.

Note: If information is available, you are requested to answer all questions in terms of your organization's most recent two financial years (the data should be provided separately for each year).

SECTION ONE

Your Total Investments in the Social Enterprise Sector

1) Which of the following most closely describes your organisation? (see Guidance Note for definitions)

- NGO or Charity
- Corporate or Private Foundation
- Aid Agency
- Development Finance Organisation
- Investment Fund
- Large Commercial Bank
- Specialist Impact Investment Bank

2) Please provide data for the TWO most recent complete financial years you have information available for.

- Yes - We can provide data for TWO financial years
- No - We can only provide data for one year

3) Please confirm here which complete financial year(s) you will reference for reporting within this survey.

4) What was the total amount of funding (£,\$,€) your organisation spent on supporting Social Enterprises and the Social Enterprise Market Infrastructure, in emerging markets, in your last financial year? (see Guidance Note for definitions)

- **Investments in individual Social Enterprises**
- **Investments in the Social Enterprise Market Infrastructure**

5) Please select which currency you are reporting in

- US Dollars (\$)
- Euros (€)
- British Pounds (£)

6) To continue with the sections of the survey that are relevant to you, please select whether you support individual Social Enterprises, the Social Enterprise Market Infrastructure, or both.

- We provide financial and/or non-financial support to individual Social Enterprises
- We provide financial and/or non-financial support to the Social Enterprise Market Infrastructure
- We provide financial and/or non-financial support to both Social Enterprises and the Social Enterprise Market Infrastructure

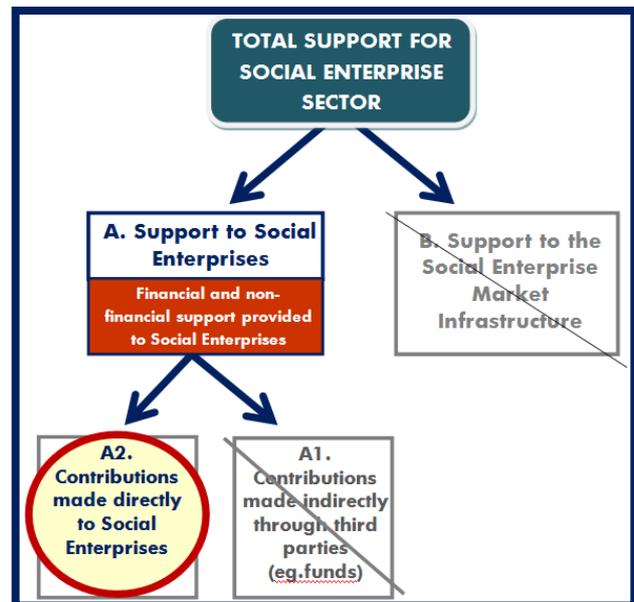
7) Of the total amount you contributed to support individual social enterprises in emerging markets, what proportion is made directly? What proportion is made indirectly, through funds or other third parties?

8) Of your 'indirect investments through funds or other third parties', please confirm which organisations/funds you have invested through.

SECTION TWO

Investments along the Social Enterprise Growth Path

This section focuses on your contributions made DIRECTLY to social enterprises in emerging markets.



9) What instruments do you use to directly support social enterprises? (Refer to Guidance Note C for definitions)

- Grants
- Debt
- Equity (Grants (including mezzanine, quasi-equity and equity-like investment))
- Guarantees and Insurance
- Non-financial business support (in kind, pro bono, etc.)
- Payments for third party service contracts

10) What proportion of your direct contribution to social enterprises was committed through each instrument?

The Social Enterprise Growth Path



Adaptation of 'stages of pioneer firm development' graphic, 'From Blueprint to Scale', Monitor Inclusive Markets

11 - 16) Please state the percentage of direct support provided through each instrument, at each stage of the Social Enterprise Growth Path. (see Guidance Note for definitions)

Questions for Investment Funds (only): Proprietary vs. Non-Proprietary Capital

17) What proportion of your total contributions to social enterprises are funded through your own capital (proprietary), and what proportion are funded through capital from investors?

18) If you are investing capital on behalf of others (non-proprietary), please state the percentage that is provided by each of the actor types below:

- NGOs & Charities
- Corporate and private foundations
- Aid Agencies
- Development Finance Organisations
- Investment Funds
- Large commercial banks
- Specialist impact investment banks
- Other

19) If any non-proprietary capital comes from organisations not listed above, please specify what 'Other' types of organisations are investing in your funds.

Duration of Investments

20) What was the average duration of the individual investments or contributions you committed to social enterprises, for all types of investment and support?

This might be the number of years after which you expect to see your initial investment returned, the number of years over which you normally disperse an individual grant/loan, or the time period over which you deliver a specific programme of non-financial support.

- < 3 years
- 3- 5 years
- 5-7 years
- 7-10 years
- 10+ years

Return on Investments

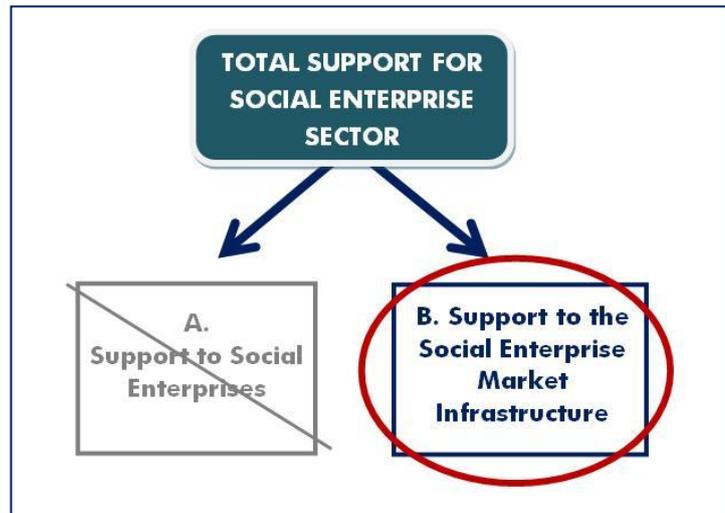
21) What return is expected across your portfolio?

- No return expected
- Return of capital invested/capital preservation (zero loss, zero gain)
- Below market rate (concessional) return
- Market rate return

SECTION THREE

Investments in Market Building and Market Infrastructure

This section of the survey focuses on contributions you have made to the Social Enterprise Market Infrastructure in emerging markets, in your last financial year.



22) What instruments do you use to support the Social Market Infrastructure in emerging markets?

23) Focusing on the total contributions made to support the Social Market Infrastructure what percentage was committed through each type of instrument?

- Grants
- Debt
- Equity (Grants (including mezzanine, quasi-equity and equity-like investment)
- Guarantees and Insurance
- Non-financial business support (in kind, pro bono, etc.)
- Payments for third party service contracts

Investments in each aspect of the Social Enterprise Market Infrastructure



24 - 29) Please state the percentage of investments made in each aspect of the Social Enterprise Market Infrastructure, by instrument type:

1. Supporting development of products & services
2. Supporting demand for products & services
3. Supporting access to finance
4. Supporting Legal, Political and Regulatory Frameworks

SECTION FOUR

Portfolio Level Information

30) Which sectors do you invest in? Please indicate the percentage of investment and support directed to each of the following sectors:

- Agriculture
- Education
- Energy and clean technology
- Financial services
- Forestry
- Health
- Housing
- Infrastructure
- Water and sanitation
- Other

31) If you invest in sectors not mentioned above, please indicate what other sectors you are supporting.

Regions

32) Which regions do you invest in? Please indicate the percentage invested in each of the following geographical regions: (Please follow this [link](#) for the list of countries in each region (World Bank))

- Europe and Central Asia
- Latin America and the Caribbean
- Middle East and North Africa
- South Asia
- Sub-Saharan Africa

Income Level of Countries

33) What is the income level of the countries that you invest in? Please indicate the percentage invested by country income category: (Please follow this [link](#) for the list of countries in each income category (World Bank))

- Low income countries: \$1,025 or less
- Lower middle income countries: \$1,026 to \$4,035
- Upper middle income countries: \$4,036 to \$12,475

These questions are repeated for your second most recent financial year.

