ADDITIONAL RESEARCH

Final Report

for Department of Enterprise, Tourism and Employment

REVIEW AND EVALUATION OF LOCAL ENTERPRISE OFFICE SUPPORTS

Additional Research *with*
Context Economics
Thrive Economics
IBP Strategy & Research

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List of Acronyms

Acronym	Full term
AES	Annual Employment Survey
AI	Artificial Intelligence
CCMA	County and City Management Association
CFO	Chief Financial Officer
CRM	Customer Relationship Management
CTO	Chief Technology Officer
DETE	Department of Enterprise, Tourism and Employment
EI	Enterprise Ireland
ETB	Education and Training Board
EVAC	Evaluation and Approvals Committee
FTE	Full-Time Equivalent
GDPR	General Data Protection Regulation
HR	Human Resources
HRIS	Human Resources Information System
IBP	IBP Strategy & Research
IDA	IDA Ireland
KPI	Key Performance Indicator
LEO	Local Enterprise Office
NEH	National Enterprise Hub
OECD	Organisation for Economic Co-operation and Development
PRSI	Pay Related Social Insurance
R&D	Research and Development
RD&I	Research, Development and Innovation
SEAI	Sustainable Energy Authority of Ireland
SME	Small and Medium-sized Enterprise
SYOB	Start Your Own Business
VfM	Value for Money

Glossary of Terms

Term	Definition
Additionality	The extent to which an outcome happened because of the support, rather than something that would have happened anyway.
Attribution	The process of linking an observed outcome to a specific intervention or support. In this report, strong attribution is difficult because businesses may receive several supports and are affected by wider market conditions.
Beneficiary	A business or individual that received support from a Local Enterprise Office.
Counterfactual	The best estimate of what would have happened if the business had not received the support.
Deadweight	The share of outcomes that would probably have happened even without the support. High deadweight means the support made less difference than reported outcomes alone might suggest.
Displacement	Where benefits for one supported business are partly offset by reduced activity in another business, for example where sales are won from competitors in the same local market.
Effectiveness	The extent to which the support achieved its intended objectives and generated useful outcomes for businesses.
Efficiency	The relationship between the resources used and the outputs or outcomes delivered. It considers whether support was delivered in a timely, proportionate and cost-effective way.
Evaluation	A structured assessment of whether a policy, programme or support is relevant, effective, efficient and achieving its intended outcomes.
Gross impact	The total reported or observed change before adjusting for what would have happened anyway, displacement or other additionality factors.
Impact	The broader or longer-term change associated with the support, such as improved business performance, employment, productivity, resilience or competitiveness.
Leakage	Where benefits from the support are captured outside the intended target group or area.
Leverage	The extent to which public support helped unlock additional private investment by the business or other funders.
Net impact	The estimated change after allowing for factors such as deadweight, displacement, leakage and substitution.
Outcome	A change or benefit resulting from the support, such as improved sales, profitability, productivity, management capability, digital adoption or environmental practice.
Output	The immediate activity delivered through the support, such as grants approved, mentoring sessions delivered, training participants supported or businesses assisted.
Relevance	The extent to which the support addresses genuine business needs and aligns with policy priorities.
Substitution	Where a business uses the support to replace activity or investment it would otherwise have funded itself, or where one type of activity is replaced by another without increasing overall benefit.
Sustainability	The extent to which benefits are likely to continue after the support has ended.
Value for money	An assessment of whether the public resources used are justified by the scale, quality and additionality of the benefits achieved.

Executive summary

Evaluation aim and scope

This evaluation provides an independent assessment of Local Enterprise Office (LEO) supports delivered to small businesses in Ireland over the period **2014 to 2025**. It considers both the performance of the main supports in scope and the wider role of the 31 LEOs as a locally delivered enterprise support infrastructure.

The evaluation covers eight principal support areas:

- Start Your Own Business Programme.
- Priming Grant.
- Feasibility Grant.
- Digital for Business / Grow Digital Voucher.
- Green for Business / Energy Efficiency Grant.
- Mentor Programme.
- Training, Networking and Management Development Support.
- Business Expansion Grant.

The evaluation draws on document review, stakeholder consultation, administrative and monitoring data, a beneficiary survey, Heads of Enterprise focus group evidence, and programme-level analysis. The beneficiary survey achieved **1,817 valid responses**, providing a strong basis for programme-level analysis and indicative support-level analysis. The achieved sample provides an estimated programme-level margin of error of **±2.26% at the 95% confidence level**[1].

Overall conclusion

Overall, the evaluation supports a **positive but moderately qualified conclusion** on the relevance, performance and value of the LEO support model.

The 31 LEOs continue to play a distinctive role in Ireland's enterprise support landscape. Their value lies not only in individual schemes, but in the broader local support infrastructure they provide: advice, the Mentor Programme, Training, Networking and Management Development Support, financial assistance, signposting and relationship-based support across different stages of the business journey.

The programme appears to generate meaningful benefits for many supported businesses, including improved productivity, sales, profitability, operational capacity, management capability, digital adoption, environmental practice, resilience and confidence. The strongest evidence is at business level and relates mainly to reported outcomes and enabling effects. Evidence on additionality is positive, but indicative rather than definitive.

The main qualification is that current delivery and evidence systems do not yet allow the full value of the LEO supports to be demonstrated or managed as clearly as they should. Weaknesses include fragmented data systems, lack of a shared Customer Relationship Management (CRM) system, uneven progression tracking, performance measures that focus mainly on activity volumes, participants and payments rather than outcomes, progression or longer-term business benefits, administrative burden and some inconsistency in delivery and referral processes.

[1] In practical terms, this means that where 50% of respondents give a particular answer, the true figure among all programme participants would be expected to fall between 47.74% and 52.26% in 95 out of 100 cases.

The core LEO model should therefore be **retained and strengthened**. The priority is not wholesale redesign, but better systems, clearer pathways, more proportionate processes and stronger outcome evidence. Evidence from businesses suggests that strong outcomes are being achieved through LEO supports; these benefits need to be systemically monitored and captured to support network-wide improvements.

Findings against the evaluation objectives

Objective 1 – Relevance

The LEO model remains highly relevant. The rationale for locally accessible, broad-based support for micro and small firms remains strong, particularly as businesses face wider pressures around digitalisation, decarbonisation, productivity, competitiveness, skills, cost inflation and resilience.

The LEO supports broadly reflect these priorities. These span business formation, feasibility testing, early growth, capability-building, digital adoption, green transition and business expansion. These align well with national policy priorities and with the needs of the intended beneficiary base.

The evidence also confirms the continuing value of the local model of support. Stakeholders and Heads of Enterprise emphasised proximity, trust, local knowledge and accessibility as central to the LEO contribution, while beneficiaries rated the service highly for professionalism, accessibility, responsiveness, clarity and relevance.

Conclusion: LEO supports remain strategically relevant and well aligned with the needs of micro and small businesses.

Objective 2 – Effectiveness

The LEO supports are broadly effective in delivering valued support to a wide range of businesses. Administrative data show substantial delivery scale, while survey evidence indicates positive reported outcomes for many beneficiaries.

The strongest reported performance effects relate to productivity, sales turnover, profitability, operational capacity, resilience and capability. Effects vary by support type. Business Expansion Grant shows the clearest association with conventional growth outcomes; Priming and Feasibility Grants support early-stage progression and validation; Digital and green supports contribute to operational improvement and transition-related change; and mentoring and training are especially important in building business knowledge, confidence, management capability and strategic direction.

Many reported effects are enabling rather than immediate headline impacts. For micro and small businesses, improved confidence, management capability and decision-making are important routes through which later performance gains may be achieved.

Conclusion: The LEO supports are broadly effective, especially in generating business-level benefits and capability improvements, although the strongest evidence relates to contribution rather than precise causal attribution.

Objective 3 – Efficiency

The 31 LEOs deliver at substantial scale and have expanded activity in several important areas, including mentoring, training, digital, green and business expansion supports. In 2025, several target-bearing measures were exceeded, including training participants, mentoring participants, Green for Business approvals, Energy Efficiency Grant approvals and Digital for Business approvals.

However, delivery efficiency is constrained by annualised budgeting, shifting approval capacity, fragmented reporting systems, manual processes, administrative burden, staffing pressures, inconsistent interpretation and the absence of a shared CRM or equivalent client-management infrastructure.

The current performance framework is useful for monitoring activity and delivery volume, but is weaker as a rounded performance management system. It captures participation, approvals, payments and

headline jobs measures, but is less effective in tracking support-specific outputs, outcomes, progression, referral quality and client journeys.

The value for money assessment is positive but qualified. The LEO supports appear to represent a credible and proportionate use of public resources, but stronger conclusions on economy and comparative efficiency are limited by evidence gaps around support-specific management costs, scheme-level cost-effectiveness and net additional impact.

Conclusion: The LEO model delivers at scale and appears to provide reasonable to good value for money, but efficiency could be strengthened through better systems, simpler processes, stronger client tracking and a more outcome-focused performance framework.

Objective 4 – Coherence

The LEO supports are broadly coherent in design. The support mix makes sense as a business journey, spanning start-up, testing, early growth, capability-building, digital adoption, green transition and expansion.

However, coherence is weaker in practice than in design. The evaluation identifies issues around progression routes, integration of newer supports, variable delivery practice, weak referral pathways and fragmented client journey tracking. The LEO supports can therefore appear coherent on paper, but less consistently joined up from the business perspective.

External coherence is also broadly sound in structural terms, but mixed in practice. The division of labour between LEOs, Enterprise Ireland, the National Enterprise Hub (NEH) and other providers is defensible in principle. However, stakeholders and Heads of Enterprise raised concerns about weak handovers, including to Enterprise Ireland, loss of named contacts, NEH role clarity, duplication in training provision and the difficulty businesses face in navigating a crowded support ecosystem.

Conclusion: The LEO supports are coherent in broad design, but not fully integrated in practice. The main challenge is not wholesale duplication, but navigability, referral quality and clarity at the margins.

Objective 5 – Sustainability

The LEO model remains broadly fit for purpose, but its future sustainability depends on adaptation and strengthening. The local model of support continues to have a strong rationale, and there is no evidence that its core role has been overtaken or undermined. LEOs have a strong brand which is recognised by businesses and stakeholders.

Many reported benefits are likely to be at least partly durable, especially where supports build management capability, operational capacity, digital systems, environmental practices, resilience or investment readiness. Mentoring, training, digital and green supports are particularly relevant because they can (and do) embed knowledge, systems and behaviours beyond the immediate period of support.

However, the model is being asked to carry a wider and more complex role. Future fit will require stronger shared data infrastructure, clearer progression pathways, more consistent processes and better outcome evidence.

Conclusion: The LEO model remains broadly sustainable and fit for purpose, but only if strengthened to meet a wider and more complex role.

Objective 6 – Impacts and additionality

The evidence points to meaningful but mainly indicative additionality. Survey responses suggest that many beneficiaries experienced outcomes that would have been less likely, slower or weaker without LEO support.

The additionality case appears strongest for early-stage firms, smaller locally traded businesses, rural businesses and firms that may not fit easily within Enterprise Ireland's export or scaling criteria. Heads of Enterprise evidence reinforced the importance of LEOs for firms that are too small, too early-stage, too locally focused or insufficiently export-oriented for other forms of support.

Survey counterfactual evidence suggests that turnover and employment would have been lower for at least some firms without LEO support. A high share of respondents also reported that comparable support would have been difficult to access elsewhere. This supports the view that LEOs reduce barriers to support and provide practical assistance that many firms would struggle to source otherwise.

However, impact and additionality cannot be quantified precisely across the LEO supports. The evidence is largely self-reported, administrative data are not designed for causal attribution, and the monitoring system does not consistently track longer-term outcomes or progression.

Conclusion: LEO supports appear to generate meaningful additional benefits for many firms, but the scale of net additional impact cannot be robustly quantified with the current evidence base.

Objective 7 – Lessons learned and recommendations

The evaluation points to a clear overall lesson: the LEO model should be retained, but the systems that support it need to be modernised.

The main lessons are that:

- Local accessibility is central to the model's value.
- The LEO supports are broadly relevant and coherent, but progression pathways need to be clearer.
- Beneficiaries value staff, advice and mentoring, but find some application and claims processes burdensome.
- The current performance framework is too focused on output volumes and uptake, and not enough on quality, progression, outcomes and additionality.
- The lack of a shared CRM system is a major constraint on delivery, referral tracking, performance monitoring and evaluation.
- Future value for money depends more on improving systems, processes, evidence and integration than on reducing the local footprint.
- The National Enterprise Hub needs a clearer operational relationship with LEOs; and
- Support design should be tested against changing business models, including flexible staffing, part-time or shared specialist roles, remote working and locally significant non-exporting firms.

Conclusion: The priority is targeted strengthening of the LEO model through better systems, clearer pathways, more proportionate processes and stronger outcome evidence.

Overall value for money judgement

The LEO supports appear to deliver **reasonable to good value for money**, with the strongest evidence relating to:

- Continuing strategic relevance.
- National reach and local accessibility.
- Positive beneficiary experience.
- Reported business benefits.
- Contribution to capability, resilience, productivity and growth.
- Support for firms that may struggle to access comparable assistance elsewhere.

The value for money case is weaker where it depends on precise quantification of management costs, net additional impact or comparative cost-effectiveness by scheme. The issue is therefore not that the LEO supports lack value, but that current evidence and performance systems do not yet allow that value to be demonstrated as clearly as it should be.

Priority recommendations

The recommendations focus on strengthening the systems, processes and evidence base that support the LEO model, rather than changing the core rationale of the model itself.

High priority

1. **Implement a shared CRM and client journey tracking system.** This is the most important enabling recommendation, supporting delivery efficiency, referral tracking, performance monitoring, additionality assessment and value for money evidence.
2. **Strengthen the performance framework beyond activity counts.** The framework should include a balanced set of delivery, output, outcome, progression, additionality and equity measures.
3. **Clarify referral pathways between LEOs, Enterprise Ireland and the National Enterprise Hub.** This should include warm handovers, named or functional contact routes, feedback loops and tracking of completed referrals.
4. **Simplify application, claims and compliance processes.** Requirements should be more proportionate to the scale, risk and value of support, especially for smaller firms and lower value supports.
5. **Preserve local flexibility while strengthening national standards.** The model should retain local responsiveness, but with clearer common standards on eligibility, documentation, referral, client tracking and service expectations.

Medium to high priority

6. **Improve budget and approval planning arrangements.** Earlier confirmation of budgets, clearer approval capacity and more predictable planning horizons (including multi-annual planning assumptions) would improve delivery efficiency and staffing continuity.
7. **Review support design against changing business models.** Scheme rules should be tested against modern business realities (and prior to any implementation), including part time or shared senior roles, remote recruitment, flexible employment models and locally significant non-exporting firms.

Medium priority

8. **Strengthen progression pathways across the LEO supports, while protecting the start-up and entrepreneurship pipeline.** The LEO supports should be managed more clearly as a business journey, with clearer routes between supports. This should include protecting Start Your Own Business, mentoring and early-stage advisory support as newer priorities grow.
9. **Protect and strengthen mentoring and capability-building supports.** These supports are central to beneficiary value and should be maintained, quality assured and differentiated from overlapping provision elsewhere.
10. **Improve measurement of business contribution, leverage and follow-on investment.** Monitoring should capture total project cost, grant paid, business contribution and, where feasible, follow-on investment.
11. **Strengthen equity and beneficiary profiling evidence.** Future monitoring should allow better assessment of who benefits from LEO support, including by geography, business stage, gender and other relevant characteristics where feasible.
12. **Use periodic evaluation modules for deeper outcome evidence.** Rotating surveys or focused studies should examine additionality, progression, business survival, productivity, digital adoption, green outcomes and referral experience without overloading routine monitoring.

Final evaluation judgement

The 31 LEOs remain a relevant, valued and broadly effective platform for small business support in Ireland. They reach firms that may otherwise struggle to access appropriate assistance, support a wide range of business needs, and contribute to capability, resilience, productivity and growth across the small business base.

The model should therefore be retained and strengthened. Its future success will depend on preserving the strengths of local delivery while modernising the shared systems, performance framework, referral pathways and administrative processes that underpin it.

1 Introduction

This report presents the findings of the Review and Evaluation of Local Enterprise Office (LEO) supports, commissioned by the Department of Enterprise, Tourism and Employment (DETE). Covering the period from the LEOs' inception in 2014 to 2025, the evaluation examines the relevance, coherence, effectiveness, efficiency, sustainability and value of a programme of supports delivered to small businesses through the 31 LEOs.

The evaluation considers both the strategic role of the LEO system within Ireland's wider enterprise support landscape and the performance of the main programmes in scope across the business journey, from start-up and early growth through to digital adoption, resilience, capability-building and expansion. It adopts a mixed-methods, theory-informed approach, combining document review, stakeholder consultation, administrative and monitoring data, and beneficiary survey evidence.

1.1 Evaluation aims and objectives

The aim of this evaluation is to provide an independent, evidence-based assessment of the suite of LEO supports delivered to small businesses in Ireland, and to inform future policy, programme development and delivery. In line with the terms of reference, the evaluation examines the relevance of LEO supports in relation to national enterprise policy, beneficiary needs and changing economic conditions; the effectiveness of the supports in generating business benefits and wider outcomes; the efficiency of delivery and the value for money achieved; the coherence of the supports within the wider enterprise ecosystem and across the LEO supports themselves; and the sustainability of both the outcomes generated and the delivery model over time. In doing so, the evaluation considers the performance of the LEO support system as a whole, while also providing proportionate assessment of the main programmes in scope, recognising differences in scale, maturity and evaluability across the LEO supports.

The evaluation **objectives**:

1. To assess the relevance of LEO supports in relation to national policy objectives, the wider socio-economic context, and the needs of intended beneficiaries.
2. To assess the effectiveness of LEO supports in delivering their intended outputs, outcomes and impacts for supported businesses.
3. To assess the efficiency of LEO supports in terms of delivery, resource use and overall value for money.
4. To assess the coherence of LEO supports within the wider enterprise support landscape, including alignment with other agencies and across the LEO supports.
5. To assess the sustainability of LEO supports and their effects, including the extent to which benefits are likely to endure, and the LEO model remains fit for purpose over time.
6. To examine the impacts and additionality of LEO supports, including the extent to which observed business effects can reasonably be attributed to the support provided.
7. To identify lessons learned and provide practical recommendations to inform future policy, programme design, delivery and performance monitoring.

1.2 Outline of in-scope LEO activities

Local Enterprise Offices provide a locally delivered suite of enterprise supports aimed primarily at start-ups, micro enterprises and small businesses across Ireland. The LEO offer combines financial and non-financial support, including advice, mentoring, training, networking, grant assistance and signposting to other parts of the enterprise support system. In this respect, LEOs operate not only as programme delivery bodies, but also as an accessible first point of contact for businesses seeking guidance on how to start, adapt, develop or grow.

This evaluation focuses on eight principal support areas within the LEO supports. These span the business journey from pre-start and early-stage development through to feasibility testing, digital adoption, environmental improvement, capability-building and business expansion. The supports include both long-established elements of the LEO offer, such as Start Your Own Business, mentoring, training and core grant supports, and newer supports introduced or expanded in response to policy priorities around digitalisation, sustainability and resilience.

The in-scope supports are summarised in Table 1.1. While these supports form the main focus of the evaluation, they should be understood within the wider LEO model. The wider role of the network includes general business advice, including business efficiency and lean supports (i.e. business improvement supports focused on efficiency, process improvement, waste reduction and productivity), local enterprise development, export support, entrepreneurship promotion, signposting and referral. This is important for the evaluation because the value of the LEO system lies not only in the performance of individual schemes, but in the broader local support architecture through which these schemes are delivered.

Table 1.1 In-scope schemes[2]

Scheme	Brief description
Start Your Own Business (SYOB) Programme	
Priming Grant	Grant support for eligible micro enterprises, and some small enterprises, within their first 18 months of trading. It helps meet start-up and early development costs.
Feasibility Grant	Grant support to help promoters assess the viability of a business idea, product or
Digital for Business	Advisory support that provides eligible businesses with access to a digital expert to assess their current position, identify digital opportunities and develop a digital action plan.
Grow Digital Voucher	
Green for Business	Advisory support that gives eligible firms access to external expertise to improve environmental performance, including resource efficiency, carbon awareness and environmental management.
Energy Efficiency Grant	
Mentor Programme	One-to-one business mentoring support to help firms address specific business challenges, improve decision-making and strengthen management capability.
Training, Networking and Management Development Support	
Business Expansion Grant	Grant support for eligible firms beyond the initial start-up phase to help them expand, invest and grow their business activity.

Source: Evaluation team summary of in-scope supports, based on DETE and Enterprise Ireland programme documentation.

[2] For consistency, this report uses the formal support names when referring to specific schemes. "Mentor Programme" refers to the LEO one-to-one mentoring support. In narrative discussion, "mentoring" is used to describe the activity delivered through that programme. "Training, Networking and Management Development Support" refers to the grouped suite of training, networking and management development activity; shorter references to "training" or "training-related supports" are used only where the meaning is clear from the context.

LEO support pathway

From start-up to growth, capability, digital and green transition

Simplified logic model showing how support pathways translate activities and outputs into outcomes and business benefits.

Cross-cutting benefits for entrepreneurs and businesses

Entrepreneurs	Strategy	Networks	Operations	Culture	Performance	Innovation	Low carbon
Confidence, knowledge and readiness	Clearer direction	Peer and adviser links	Better processes	Digital / sustainability mindset	Sales, jobs, productivity	New products and services	Energy and emissions gains

Business stage	Main supports	Activities delivered / key outputs	Immediate outcomes	Longer-term benefits
Formation	Start Your Own Business	Structured training and guidance; business planning support; start-up programmes delivered.	Improved confidence, knowledge and preparedness to start a business.	More viable start-ups; better early decisions; reduced risk of avoidable failure.
Testing and early growth	Priming Grant Feasibility Grant	Grants approved and advice provided for early investment, market testing, feasibility work and first growth steps.	Validated business proposition; stronger market knowledge; early investment capacity.	Business growth; job creation; new products/services; improved productivity.
Digital adoption and optimisation	Digital for Business Grow Digital Voucher	Digital assessment and roadmap; advisory days delivered; vouchers/grants approved for implementation.	Clearer digital strategy; improved digital maturity; stronger capability to adopt tools and systems.	More efficient operations; better customer reach; improved competitiveness and productivity.
Increasing resilience	Green for Business Energy Efficiency Grant	Green and energy assessments; action plans; grants approved for energy-saving investment.	Better understanding of sustainability and energy priorities; clearer route to action.	Reduced energy costs; lower emissions; stronger resilience; improved environmental performance.
Enhancing capability	Mentoring Training, networking and management development	Mentoring sessions, training places, workshops and peer/networking opportunities delivered.	Improved management capability; stronger decision-making; access to external expertise and wider networks.	Better business practices; increased confidence; growth, sales and productivity gains.
Expansion	Business Expansion Grant	Funding for established microenterprises to support capital investment, employment, innovation and market development.	Increased capacity to grow, compete and progress towards wider enterprise supports.	Business expansion; job creation; export potential; innovation and productivity improvements.

Source: Simplified from the supplied LEO logic model image. This is a high-level communication graphic and does not replace the detailed scheme-level logic model.

1.3 Previous evidence

Previous evaluative evidence on the 31 LEOs is limited. The main recurring evidence source is the annual impact reporting produced by Enterprise Ireland, which provides useful information on activity, reach, grant uptake, mentoring and training participation, and employment in financially supported client firms.

These reports are valuable as monitoring evidence, but they are not full evaluations. They describe scale, activity and headline outcomes, but do not establish causality, additionality or the comparative effectiveness of individual supports. They therefore provide an important baseline for this evaluation, while also underlining the need for a fuller assessment of relevance, coherence, effectiveness, additionality and value for money across the in-scope LEO supports.

1.4 Evaluation team

The evaluation has been undertaken by Additional Research and associates on behalf of DETE. The study has been delivered independently by Additional Research, working with Context Economics, Thrive Economics and IBP Strategy & Research. The team combines expertise in enterprise and business support evaluation, mixed-methods research, stakeholder consultation, beneficiary survey design and analysis, programme review, economic assessment and value for money analysis. This expertise informed both the system-level assessment of the LEO supports and the proportionate review of individual supports included within scope.

1.5 Report structure

The remainder of this report is structured as follows.

Chapter 2: Methods and evaluability

This chapter sets out the evaluation approach, evidence sources and key limitations. It explains the mixed-methods design, including document review, stakeholder consultation, administrative and monitoring data analysis, beneficiary survey work and programme-level assessment. It also discusses evaluability issues and how these have shaped the interpretation of findings.

Chapter 3: Strategic context, rationale and coherence

This chapter examines the continuing strategic relevance of the LEO model and its position within Ireland's wider enterprise support landscape. It considers the rationale for a locally delivered model of support alignment with policy priorities and business needs, internal coherence across the LEO supports, and external coherence with Enterprise Ireland, the National Enterprise Hub and other supports.

Chapter 4: LEO support scale, reach and support mix

This chapter provides the core descriptive baseline for the evaluation. It examines expenditure, activity, output evidence, employment measures, beneficiary profile, support take-up and the mix of supports used by businesses. It also identifies what the available monitoring and administrative evidence can, and cannot, tell us about delivery across the LEO supports.

Chapter 5: Outcomes, impacts, additionality and sustainability

This chapter assesses the outcomes and reported impacts associated with LEO supports. It considers business performance, productivity, innovation, digital and green change, capability-building, management development, additionality and sustainability of outcomes. It also summarises key findings by in-scope support, with more detailed programme-level analysis provided in the appendices.

Chapter 6: Delivery, governance and performance management

This chapter examines how LEO supports are governed, managed and delivered across the national network. It considers governance arrangements, the balance between local flexibility and national consistency, delivery constraints, staffing and administrative burden, CRM and data systems, beneficiary experience, performance indicators and the current performance framework.

Chapter 7: Value for money

This chapter brings together the available evidence on expenditure, delivery, outputs, outcomes, additionality and equity to assess value for money. It is structured around the four 'E's of economy, efficiency, effectiveness and equity, and identifies both the strengths of the value for money case and the main evidence limitations affecting the conclusions that can be drawn.

Chapter 8: Conclusions and recommendations

This chapter draws together the overall findings from the evaluation and provides a final assessment against the evaluation aim and objectives. It sets out the main lessons from the evidence and presents prioritised recommendations for DETE, Enterprise Ireland and the 31 LEOs.

Appendices

The appendices provide detailed programme-level assessments for the main supports in scope, namely Start Your Own Business, Priming and Feasibility Grants, Digital for Business / Grow Digital Voucher, Green for Business / Energy Efficiency Grant, Mentoring and Training / Networking / Management Development, and Business Expansion Grant. They also include supporting material on stakeholders consulted and the beneficiary survey questionnaire.

2 Methods

2.1 Overview of approach

This evaluation adopted a theory-informed, mixed-methods approach to assess the relevance, coherence, effectiveness, efficiency, sustainability and value of Local Enterprise Office (LEO) supports across the period under review. The approach combined evidence from a document and literature review, stakeholder consultation, administrative and monitoring data, beneficiary survey work, and programme-level analysis in order to develop a rounded assessment of both the LEO support system as a whole and the principal supports within scope. In line with the structure of the report, the evaluation is concerned not only with the performance of individual schemes, but also with the wider rationale, delivery model and position of the 31 LEOs within Ireland's enterprise support landscape.

A logic model for the LEO supports was co-developed with the client during the early stages of the evaluation. This provided a shared framework for understanding how the LEO model is expected to work, linking inputs and activities to immediate outputs, business-level outcomes and wider policy objectives. A summary version of the logic model is presented in Chapter 1 to support the reader's understanding of the LEO supports and the evaluation focus.

The logic model also informed the design of the fieldwork approach. It helped identify the main pathways through which LEO supports might be expected to contribute to business formation, capability-building, digital and green transition, productivity, resilience, growth and progression through the wider enterprise support landscape. These pathways were then reflected in the stakeholder topic guides, beneficiary survey design, programme-level review framework and interpretation of evidence. In this sense, the logic model was used not as a fixed statement of causality, but as a practical evaluative framework for testing the plausibility, strength and consistency of the contribution made by LEO supports across different parts of the programme.

A mixed-methods design is appropriate given the nature of the evaluation questions and the diversity of the support offer. Documentary and stakeholder evidence are especially important for questions of strategic relevance, coherence, governance and future fit. Administrative, monitoring and financial data provide the main evidence on programme scale, reach, expenditure, activity and available output measures. Beneficiary survey evidence is particularly valuable in understanding service experience, reported outcomes, and indicative additionality. Findings have been developed through triangulation across these sources rather than reliance on any single dataset or perspective.

The evaluation has also been undertaken at two levels. First, the main report presents cross-cutting findings and judgements on the LEO supports overall, drawing together common patterns across supports and considering the wider performance of the system. Second, programme-level appendices provide more focused assessments of the principal supports in scope, using a common framework but with analysis depth proportionate to programme scale, maturity and evidential strength. This reflects the terms of reference and helps ensure full coverage of the LEO supports without over-interpreting weaker evidence for smaller, newer or less readily evaluable schemes.

2.2 Main evidence sources

The evaluation draws on five main sources of evidence.

First, a **document and literature review** was undertaken to establish the strategic and policy context for the evaluation, identify the rationale and evolution of the LEO support model, review programme documentation, and draw out relevant findings from previous studies, performance material and related evidence. This provides an important foundation for assessing relevance, coherence and delivery arrangements.

Second, the evaluation included **stakeholder consultation** with actors involved in the design, oversight, delivery and interface of LEO supports. This included Departmental, Enterprise Ireland, LEO and delivery-partner perspectives, supplemented by a Heads of Enterprise focus group.

In this report, **Head of Enterprise** refers to the senior local manager responsible for leading an individual Local Enterprise Office within its Local Authority context. **Heads of Enterprise** refers collectively to these local LEO leaders across the network. Where the report refers to the **Heads of Enterprise focus group**, this means the group discussion held with a sample of Heads of Enterprise to gather collective evidence on local delivery, governance, performance management and implementation issues.

This strand provided insight into the strategic role of the 31 LEOs, delivery experience, governance and management issues, complementarity with other provision, and views on strengths, limitations and future priorities.

Third, the evaluation uses **administrative, monitoring and financial data** to establish the scale, reach and composition of support activity and to inform assessment of delivery and value for money. These data provide the basis for descriptive analysis of budgets, participation, outputs and, where available, programme performance indicators. As with most programme evaluations of this kind, the quality, consistency and completeness of administrative evidence vary by programme and time period.

Fourth, the evaluation includes a **beneficiary survey** of businesses that received LEO support. The survey was used primarily to assess beneficiary profile, service experience, reported outcomes and indicative additionality.

Fifth, the evaluation draws selectively on **case evidence** to illustrate how supports operated in practice and the kinds of effects reported by supported businesses. These are not intended to be statistically representative, but to enrich interpretation and provide concrete examples of support pathways and business experience.

2.3 Beneficiary survey approach

A beneficiary survey formed an important part of the evidence base for the evaluation, particularly in relation to beneficiary profile, user experience, self-reported outcomes and indicative additionality. The survey was delivered online through the 31 LEOs, with LEOs asked to distribute the survey through their Measure 1 email lists (Measure 1 supports are the financial grants available via LEOs - Business Expansion Grant, Feasibility Grants and Priming Grants), e-zine lists or equivalent channels following a briefing session and the issue of standardised supporting material. Fieldwork ran from **20 February to 27 March 2026**, including an extended reminder period beyond the initial closing date. The questionnaire covered business profile, supports received, service quality and accessibility, programme-specific and overall business benefits, and self-reported turnover, employment and counterfactual questions relevant to additionality.

As distribution was undertaken through individual LEOs rather than a single centrally issued sample, the evaluation cannot fully verify consistency of distribution lists, survey open rates or the extent to which all eligible businesses had the same probability of receiving the survey. The results should therefore be interpreted as a strong beneficiary survey evidence base rather than as a fully controlled random sample.

At programme level, the survey achieved **1,817 valid responses**, with responses received across all LEOs; **1,722 respondents** identified the LEO with which they had most contact. On the basis of an estimated in-scope population developed with Enterprise Ireland, the **unweighted average response rate by LEO was 6.36%** and the **median response rate was 5.92%**. Response rates varied from **2.08% to 27.32%**, although the highest figure represented a single outlier; excluding this outlier, response rates for the remaining LEOs varied between **2.08% and 9.85%**. The achieved sample provides a strong basis for programme-level analysis, with an estimated **margin of error of ±2.26%** at the 95% confidence level on a 50:50 response. In practical terms, this means that where 50% of respondents give a particular

answer, the true figure among all programme participants would be expected to fall between 47.74% and 52.26% in 95 out of 100 cases. Support-level analysis is also feasible for the principal in-scope supports, although margins of error are wider for the smaller support subsamples. The survey questionnaire is provided in **Appendix A8**.

Survey evidence is used primarily to assess beneficiary experience, reported outcomes and indicative contribution, and is interpreted alongside documentary, administrative and stakeholder evidence rather than as a stand-alone measure of causal impact. This reflects both the value and the limits of beneficiary self-reported data, particularly where questions of attribution, deadweight or longer-term impact arise.

Table 2.1 Beneficiary survey response summary

Measure	Result
Valid survey responses	1,817
Respondents identifying LEO area	1,722
LEO coverage	All LEOs represented
Unweighted average response rate by LEO	6.36%
Median response rate by LEO	5.92%
Full response rate range by LEO	2.08% to 27.32%
Response rate range excluding single outlier	2.08% to 9.85%
Programme-level margin of error (50:50 response, 95% confidence)	±2.26%

Source: Authors.

Table 2.2 Beneficiary survey achieved sample by support element

Support element	Achieved sample*	Margin of error (50:50 response)
Start Your Own Business Programme	358	±5.16%
Priming Grant	252	±6.16%
Feasibility Grant	176	±7.37%
Digital for Business Scheme / Grow Digital Voucher	357	±5.17%
Green for Business Scheme / Energy Efficiency Grant	137	±8.36%
Mentor Programme	504	±4.34%
Training, Networking and Management Development Support	312	±5.53%
Business Expansion Grant	324	±5.43%

** Based on respondents selecting the support as one of their two most important support elements and therefore being routed to the support-specific questions.*
Source: Authors.

The achieved support-level sample sizes are sufficient to support indicative analysis for each of the principal in-scope supports, although results for smaller support groups, particularly **Green for Business / Energy Efficiency Grant** and **Feasibility Grant**, should be interpreted with greater caution because of wider margins of error.

2.4 Analysis, evaluability and limitations

The evaluation uses a process of triangulation to develop findings and judgements. Rather than treating each evidence source in isolation, the analysis compares and combines evidence across documents, monitoring data, consultation and survey material to identify areas of convergence, tension or uncertainty. At programme level, the analysis focuses on common themes and patterns across the LEO support offer. The same questions are explored in a more focused way for the principal supports in scope in the appendices. This allows the evaluation to move between system-level judgement and programme-level insight while maintaining a consistent framework across the report and appendices.

The evaluation has adopted an explicit principle of evaluability and proportionality. Supports differ in age, purpose, scale, delivery model, data availability and the extent to which outcomes can be observed within the period under review. Programme-level assessments are therefore proportionate to the scale, maturity and evidential strength of each support, and the main report gives greater prominence to cross-cutting findings than to detailed commentary on smaller, newer or less readily evaluable schemes. This helps avoid over-claiming where the evidence base does not support stronger judgement.

The main evaluability constraints are incomplete or inconsistent support-level monitoring over time, limited routine outcome data, weak tracking of client journeys and progression, lack of a consistent counterfactual, and variation in the maturity and design of supports. Some supports are longer established and better documented than others, while monitoring and performance data vary in completeness and comparability by programme and time period. In particular, the routine monitoring system is stronger on expenditure, approvals, payments, participation and selected employment measures than on support-specific outputs, client progression, outcome persistence or additionality.

Attribution also needs to be treated with care. Business outcomes are shaped by a range of external influences, including market conditions, sectoral factors, business capability, wider economic shocks and the use of other forms of support. Beneficiary survey evidence is valuable in understanding service experience, reported outcomes and indicative additionality, but it is based on self-reporting and should not be treated as a stand-alone basis for causal inference. Similarly, administrative data are useful for understanding scale, reach and activity, but are not designed to isolate the net impact of individual supports.

These constraints do not prevent meaningful evaluation, but they do shape the way findings are presented. Throughout the report, conclusions are framed to reflect the strength and consistency of the available evidence. Stronger judgements are made where multiple sources align; more cautious commentary is used where evidence is partial, uneven or dependent mainly on beneficiary perception. For this reason, the report generally uses the language of contribution, reported effects and indicative additionality, rather than definitive net impact, except where the evidence supports stronger judgement.

3 Strategic context, rationale and coherence

Terms of reference coverage

This chapter mainly addresses the following evaluation objectives from the terms of reference:

- **Objective 1 – Relevance:** assessing the continuing rationale for LEO supports, their strategic fit, and their alignment with national policy priorities and business needs.
- **Objective 4 – Coherence:** assessing the internal coherence of the LEO supports and their external coherence with Enterprise Ireland, the National Enterprise Hub and other enterprise supports.
- **Objective 5 – Sustainability:** considering whether the LEO model remains fit for purpose in light of changing policy priorities, business needs and the wider support landscape.

The chapter therefore examines the continuing rationale for the LEO model, its alignment with national policy and small business needs, and whether the support offer remains coherent and fit for purpose within the wider enterprise support landscape.

3.1 Introduction

This chapter assesses the strategic relevance, coherence and future fit of the Local Enterprise Office (LEO) model in the context of changing policy priorities, evolving business needs and a more complex enterprise support landscape in Ireland. It treats the LEO system not simply as a collection of individual supports, but as a locally delivered support architecture with a distinctive role as an accessible first point of contact for micro and small businesses.

The chapter is structured around the three linked questions accordingly. It begins by setting out the intended role of the LEO model within the wider enterprise support landscape, before examining the strategic and operating context over the evaluation period. It then assesses the continuing rationale for the model, the internal coherence of the LEO supports, and their external coherence with other provision. The chapter concludes by drawing these strands together into an overall judgement on whether the LEO model continues to provide a strategically relevant and operationally coherent platform for locally delivered small business support in Ireland.

3.2 The LEO support model and place in the enterprise landscape

Local Enterprise Offices are intended to provide an accessible, locally delivered first point of contact for micro and small businesses in Ireland, including prospective start-ups, early-stage firms and established small businesses seeking to adapt, develop or grow. In practice, the model combines both financial and non-financial support, including advice, mentoring, training, grant assistance and signposting, through a network embedded across the 31 local authority areas. The LEO Policy Statement 2024–2030 describes LEOs as the State's "first stop shop" for business and entrepreneurship, while also emphasising their role as a gateway to the wider landscape of Government and non-Government supports.[3] In practical terms, this means a locally accessible entry point through which micro and small businesses can obtain advice, mentoring, training, grant assistance and signposting to wider supports.

Internal programme guidance and impact reporting similarly indicate an offer that spans business formation, early growth, capability-building, digital adoption, green transition and expansion, rather than a narrow set of stand-alone schemes.[4]

[3] Department of Enterprise, Trade and Employment (2024a) *Local Enterprise Offices Policy Statement 2024–2030*. Dublin: Department of Enterprise, Trade and Employment.
[4] Enterprise Ireland (2026a) *Local Enterprise Offices EVAC Handbook V2*. Internal programme guidance; Enterprise Ireland (2026b) *Combined Impact Reports*. Internal programme reporting.

The significance of the LEO model therefore lies not only in the individual supports it delivers, but in the combination of local presence, visibility and breadth that the network provides. For smaller firms, particularly those with limited management capacity or limited familiarity with the support system, this can reduce information barriers, improve accessibility and make it easier to identify an appropriate starting point. In that sense, the evaluation treats the LEO system as a broader support architecture rather than simply as a collection of discrete interventions. This is consistent with the Organisation for Economic Co-operation and Development's (OECD) earlier assessment that LEOs occupy an important place within Ireland's small and medium-sized enterprise (SME) and entrepreneurship support framework, particularly in strengthening local entrepreneurship ecosystems and improving the reach of support to smaller firms.[5]

This interpretation was strongly reinforced by the Heads of Enterprise focus group. Participants described the core contribution of LEOs in terms of proximity, local trust and practical accessibility, emphasising that LEOs are embedded in communities and can support businesses from pre-start through to growth. As one participant put it, **"local is the first word in our name".** This supports the evaluation's interpretation of the LEO model as a locally embedded support architecture rather than simply a set of schemes.

Within the wider enterprise landscape, LEOs occupy an intermediate and complementary position. They are intended to support firms at an earlier, smaller-scale or more locally grounded stage than some national supports, while also providing a route into broader provision as businesses progress. This includes progression, where appropriate, towards Enterprise Ireland supports for firms with stronger scaling or export potential, as well as signposting to other relevant bodies and schemes. The model is therefore designed not only to deliver direct assistance, but also to improve the accessibility and usability of the wider support system for smaller businesses.[6]

Set out in these terms, the intended role of the LEO system is clear and strategically plausible. The more important evaluative question, addressed in the rest of this chapter, is whether this role remains sufficiently distinctive, coherent and operationally convincing in a more demanding policy and delivery environment.

3.3 Strategic and operating context

Over the evaluation period, the strategic context for LEOs has become more demanding. National enterprise policy has shifted beyond a relatively narrow focus on business formation and early growth towards a wider ambition of building competitive advantage through sustainability, innovation, productivity, resilience and regional development.[7] This implies a broader and more strategic role for supports aimed at micro and small firms than in earlier policy periods.

This broader role is reflected clearly in the LEO Policy Statement 2024–2030, which confirms LEOs as the State's localised model of support for business while also signalling an expanded remit. In addition to entrepreneurship and early-stage support, LEOs are now expected to help businesses digitalise, decarbonise, strengthen competitiveness in their locally traded sector and, increasingly, develop export potential. The Policy Statement explicitly notes that, particularly since 2020, LEOs have broadened their engagement both with manufacturing and internationally traded services firms and with smaller locally traded, non-exporting businesses, in order to support productivity and respond to the demands of a digital, low-carbon economy.[3] In effect, the 31 LEOs have moved beyond a narrower start-up support function towards a more central role in delivering national enterprise policy at local level.

[5] OECD (2019) *SME and Entrepreneurship Policy in Ireland*. Paris: OECD Publishing
[6] Enterprise Ireland (2025) *Strategy 2025–2029: Delivering for Ireland, Leading Globally*. Dublin: Enterprise Ireland.
[7] Department of Enterprise, Trade and Employment (2022) *White Paper on Enterprise 2022–2030*. Dublin: Department of Enterprise, Trade and Employment.

The same direction is reflected in wider strategy documents. The White Paper on Enterprise Implementation Plan: Update Report (H2 2024), the DETE Statement of Strategy 2025–2028 and the Action Plan on Competitiveness and Productivity all place emphasis on competitiveness, productivity, digitalisation, green transition, SME scaling, locally traded sectors, regional development and business resilience.[8] Impact 2030 and the National Smart Specialisation Strategy for Innovation also strengthen the case for accessible supports that help smaller firms build capability, adopt new practices and connect into wider enterprise and innovation ecosystems.[9] Across these strategies, the common direction is clear: LEOs are increasingly expected to support not only start-up activity, but also digitalisation, decarbonisation, productivity, resilience, locally traded sector competitiveness and progression towards wider enterprise supports.

OECD analysis provides a complementary external perspective. The OECD's review of SME and Entrepreneurship Policy in Ireland identified a generally strong SME support environment, but also highlighted persistent weaknesses in SME productivity, export participation, management capability and the strength of local entrepreneurship ecosystems.[10] More recent OECD economic analysis points to a context of heightened uncertainty, weaker investment conditions and increased trade fragility, underlining the importance of policies that strengthen business resilience and adaptability.[11]

The Heads of Enterprise focus group echoed this picture of a widened role. Participants referred to LEO contributions to competitiveness, sustainability, digitalisation, local job creation and regional coordination, with one participant describing the LEO role as bringing **"national policy together with local action".** However, the same discussion also highlighted the practical pressure created by changing government priorities and top-down programme adjustments. This suggests that future fit depends not only on the strategic relevance of the support offer, but also on whether policy changes are tested effectively against local delivery realities.

Stakeholder evidence is broadly consistent with this strategic picture. Interviewees described LEOs as occupying a distinct and still important place within the support landscape: locally embedded, accessible, and particularly valuable for smaller and more locally grounded firms, while also supporting some businesses with future export or scaling potential. At the same time, stakeholders pointed to the fact that the system is now being asked to serve a wider range of business types and policy aims than in the past. One Enterprise Ireland stakeholder described a dual role for LEOs: as the "first rung on the ladder" for firms that may later scale, and as the wider support agency for the local enterprise base, especially locally traded firms. The same stakeholder also suggested that the stronger policy emphasis on locally traded sectors, sustainability and digitalisation may risk diluting attention from fostering a start-up culture and developing the pipeline of manufacturing and internationally traded businesses. Feedback from the consultation process/stakeholder engagement, similarly, drew a distinction between LEOs' role in supporting smaller, locally focused enterprises and their role in preparing some firms for progression to Enterprise Ireland, while also identifying a more crowded support environment and greater demands on coherence and consistency.

The operating context over the evaluation period has also been challenging. Businesses have had to navigate the effects of Covid-19 and post-pandemic adjustment, rapid digital acceleration, Brexit-

[8] Department of Enterprise, Tourism and Employment (2025) *White Paper on Enterprise Implementation Plan: Update Report H2 2024*. Dublin: Department of Enterprise, Tourism and Employment; Department of Enterprise, Tourism and Employment (2025) *Statement of Strategy 2025–2028*. Dublin: Department of Enterprise, Tourism and Employment; Government of Ireland (2025) *Action Plan on Competitiveness and Productivity*. Dublin: Government of Ireland.

[9] Department of Further and Higher Education, Research, Innovation and Science (2022) *Impact 2030: Ireland's Research and Innovation Strategy*. Dublin: DFHERIS; Department of Enterprise, Trade and Employment (2024) *Progress Report 2024: National Smart Specialisation Strategy for Innovation 2022–2027*. Dublin: Department of Enterprise, Trade and Employment.

[10] OECD (2019) *SME and Entrepreneurship Policy in Ireland*. Paris: OECD Publishing.

[11] OECD (2025) *OECD Economic Outlook, Volume 2025 Issue 1: Tackling Uncertainty, Reviving Growth*. Paris: OECD Publishing; OECD (2025) *OECD Economic Outlook, Volume 2025 Issue 2: Resilient Growth but with Increasing Fragilities*. Paris: OECD Publishing.

related disruption, stronger climate and energy obligations, labour market tightness, rising wage and input costs, including those arising from economic shocks and a more complex regulatory and cost environment. These pressures help explain why digital, green, capability-building and resilience-oriented supports have become more prominent within the LEO offer. Internal impact reporting also points to the way LEO activity has adapted over time to these pressures, including through Brexit supports, customs training, online trading assistance, business continuity measures and the growing prominence of lean, digital and related capability-building interventions.[12]

Stakeholder interviews reinforce this point. Feedback from the consultation process/stakeholder engagement suggested that public services, including LEOs, had in some respects become too remote since the Covid-19 pandemic, with a need for deeper face-to-face engagement to support firms through more demanding strategic challenges. A senior LEO stakeholder also pointed to a tougher local operating environment shaped by skills shortages and broader business pressures, while arguing that the local embeddedness of the LEO model remains particularly important in places where indigenous enterprise dominates.

Overall, the evidence suggests that the policy rationale for the LEO model remains strong and has, in some respects, strengthened over time. However, relevance and sustainability must now be judged against a more demanding backdrop than in earlier years. The question is no longer only whether LEOs provide useful local business support, but whether the network is sufficiently clear, coherent and adaptable to meet a widened role spanning entrepreneurship, capability, digitalisation, green transition, resilience and business progression. Stakeholder evidence supports that overall direction of travel, but also points to practical tensions around consistency, system navigation, referral pathways, staffing capacity and the balance between national expectations and locally responsive delivery.

3.4 Rationale for the LEO model

The rationale for the LEO model rests on a clear set of market and system failures affecting micro and small firms. Many smaller businesses face information and navigation barriers, limited management capacity, difficulty funding early-stage or developmental activity, and uncertainty about where to find appropriate support. In a fragmented system, they may struggle to identify what support exists, whether they are eligible, and where to start. A visible local access point can therefore reduce search costs, improve awareness and help firms navigate towards the most appropriate support, whether within the LEO offer or elsewhere in the enterprise system.[13]

There is also a capability rationale. Smaller firms often lack in-house capacity in areas such as business planning, management development, digital adoption, energy efficiency and market development. The combination of mentoring, advisory support and relatively small-scale grant or consultancy assistance is intended to help address these gaps in a practical and proportionate way. There is also a finance and risk rationale at early stage, where businesses may find it difficult to fund exploratory, developmental or capability-building activity, especially where returns are uncertain or intangible. Finally, there is a coordination rationale across a crowded support environment, with a risk that firms do not progress smoothly between local, regional and national supports unless an intermediary helps them make sense of the system.

Focus group evidence reinforces this rationale. Heads of Enterprise argued that without LEOs some start-ups and locally traded firms would receive little or no support, particularly where they are too small, too early-stage, or not sufficiently export-oriented for Enterprise Ireland. As one participant put it, **"we welcome everybody and anybody; we don't turn businesses away".** Participants also

[12] Enterprise Ireland (2026) *Combined Impact Reports*. Internal programme reporting.
[13] OECD (2019) *SME and Entrepreneurship Policy in Ireland*. Paris: OECD Publishing.

emphasised the cumulative local economic value of supporting many small firms to sustain and create jobs, even where each individual business is modest in scale.

The local character of the model is part of the rationale rather than merely an administrative feature. Being embedded within local authorities gives LEOs visibility, local reach and a degree of trust and accessibility that may be particularly important for firms that would not otherwise engage with formal enterprise supports. The LEO Policy Statement places strong emphasis on this local dimension, arguing that the needs of the micro and small business sector are most appropriately met at the local level and that LEOs contribute to entrepreneurship, local enterprise development and economic resilience in communities across the country.[3]

Stakeholder evidence broadly supports this. An Enterprise Ireland policy and performance stakeholder described the original idea behind the LEOs as a localised model of support offering a visible point of access for information, guidance and advice. Feedback from the consultation process/stakeholder engagement also emphasised the continuing value of local knowledge, accessibility and the ability to support firms at an earlier and more locally grounded stage than larger-scale national provision.

This rationale continues to hold and, in some respects, has strengthened as the support landscape has become more complex and the demands on small firms have widened to include digitalisation, decarbonisation, resilience and adaptation alongside start-up and growth. The case for a local, trusted and broad-based entry point therefore remains strong. The key evaluative issue is no longer whether such a model is justified in principle, but whether the current LEO system still performs that role clearly and effectively in practice: whether it remains accessible and distinctive for businesses, whether it connects firms effectively to the wider support architecture, and whether the balance of local reach, consistency and progression continues to justify the model in today's enterprise environment.

3.5 Strategic alignment and internal coherence of the LEO support

The evidence suggests that the overall LEO support offer is broadly aligned with current enterprise strategy and continue to reflect the main areas of need among its intended beneficiaries. At a strategic level, the support mix corresponds well to the role now envisaged for LEOs in policy: not only supporting entrepreneurship and early-stage business development, but also helping smaller firms improve productivity, adopt digital tools, respond to sustainability pressures, strengthen management capability and, where appropriate, progress towards export growth.[14] In that sense, the broad architecture of the LEO supports appears strategically coherent: the main elements of the offer map reasonably well onto the current policy priorities that LEOs are expected to address.

The LEO supports also make sense when viewed as a business journey rather than a list of isolated schemes. Taken together, the supports span business formation, testing and early growth, capability-building, digital adoption, green transition and expansion. This provides, in principle, a reasonably comprehensive pathway for micro and small firms at different stages of development. Start-up and early-stage firms can access training, mentoring, feasibility and priming support; more established firms can engage with digital and green supports, management development and, where eligible, expansion funding; and there is an intended progression route for some firms towards Enterprise Ireland support, although the transition from LEOs to Enterprise Ireland support could be improved in practice (see 3.6). Chapter 4 provides fuller evidence on beneficiary profile, support take-up and support use by business stage.

The logic of complementarity across the LEO supports is also broadly sound. Mentoring and training appear to function as enabling supports that can sit alongside, or ahead of, more targeted interventions. Digital and green supports address two of the most prominent newer strategic priorities and are framed

[14] Department of Enterprise, Trade and Employment (2024) *Local Enterprise Offices Policy Statement 2024–2030*; Department of Enterprise, Tourism and Employment (2025) *White Paper on Enterprise Implementation Plan: Update Report H2 2024*.

around productivity, efficiency and resilience, especially for locally traded firms. Internal impact reporting is consistent with this picture, showing a support model that has repeatedly combined financial assistance with mentoring, training, online trading, export preparation, lean and entrepreneurship supports over time, rather than operating as a narrow grant-only system.[12]

Stakeholder evidence broadly supports this view, but with some important qualifications. Feedback from the consultation process/stakeholder engagement described the offer as generally appropriate and well received overall, particularly emphasising the value of local knowledge, mentoring and support for smaller firms, including both lifestyle businesses and firms with future export or scaling potential. An Enterprise Ireland operational stakeholder similarly saw the current mix as broadly strong, especially in relation to digitalisation and sustainability, and viewed the priming and business expansion grants as flexible and useful instruments. Both perspectives support the conclusion that the programme has evolved in a way that broadly reflects the changing strategic context and the varied needs of the small business base.

At the same time, these interviews also point to important tensions. The system is trying to serve several distinct cohorts at once, and there is some risk that, as emphasis has widened towards locally traded sectors, digitalisation and sustainability, the LEO supports may have become less clearly focused on start-up progression and the pipeline of manufacturing and internationally traded firms. The Heads of Enterprise focus group also highlighted areas where support design may not fully reflect changing business models. Participants pointed in particular to the limits of current salary supports, the increasing use of part time or specialist roles such as Chief Technology Officer (CTO) and Chief Financial Officers (CFO), remote recruitment, and businesses that do not fit traditional assumptions around fixed local premises or full-time employment. As one participant put it, **"our salary supports are too focused on full-time jobs".** This suggests that the LEO supports are strategically aligned in broad terms, but that some eligibility and design features may need updating to remain fully fit for purpose.

Survey evidence is consistent with a generally positive view of alignment and relevance, while also suggesting that coherence should not be overstated. As shown in Table 3.1, beneficiaries rated LEO service quality positively across all measured dimensions, with particularly strong scores for professionalism, accessibility and responsiveness. These findings suggest that, from the client perspective, the overall offer is generally seen as relevant and usable, which is a necessary condition for internal coherence in practice as well as in design.

Table 3.1 Beneficiary ratings of LEO service quality and relevance

Aspect of delivery	% good / very good
Professionalism and expertise of staff	91.4%
Accessibility of support	89.5%
Responsiveness to queries	88.7%
Clarity of information and guidance	86.5%
Relevance of advice and support	84.0%
Ease of application for financial support	71.9%

Source: LEO beneficiary survey, Q2.3; analysis by evaluation team. Percentages show "Good" or "Very Good" responses and exclude "Don't know / Not relevant".

At the same time, the evidence suggests that the LEO supports operate as a reasonably joined up offer more clearly in principle than always in practice. Stakeholders identified several issues that weaken coherence at system level: inconsistent interpretation of criteria across LEOs, variable delivery practice, weak referral and progression processes, limited CRM infrastructure, and a wider support landscape that can still be difficult for firms to navigate. These are not signs that the LEO supports lack

strategic logic. Rather, they suggest that the main coherence challenges lie in integration, consistency and progression.

There are also signs of some weaker joins within the programme itself. The strategic direction of newer digital and green supports appears clear, but their integration with older core supports is still partly developmental (for some practitioners, for example, digital is inextricably linked to lean business improvements). More broadly, while the programme includes the main elements one would expect across a small business journey, there remain questions about progression routes, whether some firms receive a sequence of supports that builds capability cumulatively, and whether other firms experience the offer more as a set of separate transactions. This is where the distinction between strategic alignment and lived coherence becomes important: the former appears reasonably strong, while the latter appears more uneven, not helped by the inability of systems to record and track progression.

Overall, the evaluation evidence points to a programme that is strategically aligned and broadly coherent, but not fully integrated. The support mix makes sense in light of current policy priorities and beneficiary needs, and the main elements of the offer are complementary at a conceptual level. However, there are still weak progression routes, uneven integration and operational frictions that limit how far the offer functions as a fully joined-up business journey in practice. The main implication is therefore not that the programme requires wholesale redesign, but that greater simplification, clearer progression pathways, stronger referral pathways and more consistent system-wide delivery would improve the coherence of an offer that is already broadly well aligned.

3.6 External coherence with other state-supported provision

The external coherence of the LEO model appears broadly sound in design, but more uneven in practice. On paper, the division of labour is reasonably clear. LEOs are positioned as the locally delivered model of support for micro and small businesses, offering business advice, mentoring, training, grant support and signposting. Enterprise Ireland provides more specialist support for firms with stronger scaling and export potential, while the National Enterprise Hub (NEH) is intended to simplify access to the wider cross-government support landscape. In principle, this creates a coherent layered structure: local entry and diagnosis through LEOs, wider signposting through the NEH, and progression to more specialist provision where business needs move beyond the LEO remit.[15]

This broad architecture is strategically sensible. Smaller firms often need accessible front-door support around business enablement, capability, digitalisation, green transition and early development before they are ready for more specialised agency support. In this respect, the relationship between LEOs and Enterprise Ireland appears complementary rather than duplicative in principle. The same is broadly true of the wider support landscape: the existence of multiple providers is not in itself a weakness if their roles are sufficiently distinct and if businesses can move between them without unnecessary friction.

However, the evidence suggests that this apparently clear model is not always experienced as clear by users or stakeholders. Survey findings show that LEO clients use a mixed support environment rather than a neatly segmented one. As shown in Table 3.2, respondents reported using Enterprise Ireland, Skillnet Ireland, external advisers and other sources alongside LEO support, while a large minority reported using none of the listed alternatives. This does not in itself imply duplication, but it does suggest that the real test of external coherence is whether different channels feel joined up from the user perspective.

[15] Department of Enterprise, Trade and Employment (2024) *Local Enterprise Offices Policy Statement 2024–2030*; Enterprise Ireland (2025) *Strategy 2025–2029: Delivering for Ireland, Leading Globally*.

Table 3.2 Other sources of business support or advice used

Other source used	% of respondents
External advisers, such as consultants, accountants or legal advisers	29.3%
Enterprise Ireland	20.9%
Skillnet Ireland	17.2%
Other source	10.3%
IDA Ireland	0.9%
None of the above	39.6%

Source: LEO beneficiary survey, Q2.10; analysis by evaluation team. Percentages are based on all valid survey responses, n=1,817. Respondents could select more than one option.

Stakeholder evidence reinforces this mixed picture. Feedback from the consultation process/stakeholder engagement described a fairly clear conceptual distinction between Enterprise Ireland and the LEOs, with the latter primarily serving smaller and more locally focused businesses, while also supporting a cohort of firms that may later progress into Enterprise Ireland support. However, the same stakeholder also identified weak referral processes, ecosystem complexity and the lack of CRM infrastructure as important barriers to effective coherence in practice. The issue is therefore less that the agencies have identical roles than that the pathways between them are not sufficiently streamlined, visible or easy to manage.

Other interview evidence points more clearly to confusion at the user-facing edge of the system. An Enterprise Ireland policy and performance stakeholder described a wider ecosystem in which businesses may hear parallel messages from LEOs, Enterprise Ireland and the National Enterprise Hub, each presenting itself as a route into support. The concern was not that the underlying roles are impossible to distinguish, but that the system can appear crowded and duplicative from the outside, particularly when businesses are expected to understand institutional boundaries that are clearer to policy actors than to firms.

There are also signs that progression to more specialist provision is not always smooth. The LEO Policy Statement places clear emphasis on ensuring a pathway of progression from LEO to Enterprise Ireland, and stakeholder evidence supports the importance of that route. However, stakeholders noted that referrals between LEOs and Enterprise Ireland need to be streamlined, that transitions are not only one-way, and that some firms may be reluctant to move beyond the LEO because the local relationship feels more accessible and responsive. This does not point to direct duplication between agencies so much as a boundary that is clear administratively but not always convincing experientially.

This was strongly reinforced by the Heads of Enterprise focus group. Participants described frustration with the current referral route to Enterprise Ireland, including the loss of named contacts, slow funding processes and a perceived weakening of the "warm handover" from LEOs to Enterprise Ireland. In some cases, Heads reported that clients were reluctant to move beyond the LEO because the local relationship felt more accessible and responsive. This supports the conclusion that the Enterprise Ireland–LEO boundary is not primarily a problem of formal role definition, but of practical progression, responsiveness and relationship management.

Overall, the evidence suggests that LEOs are externally coherent with other state-supported provision in broad structural terms, but that this coherence is only partly realised in the lived business journey. The LEO role alongside Enterprise Ireland and other relevant provision is defensible and broadly complementary on paper. The main weakness is less one of wholesale duplication than one of navigability, handover quality and clarity at the margins. Businesses may still encounter overlapping messages, weak referral processes, or uncertainty about which part of the system is best placed to help them next. The main implication is therefore not that the architecture is fundamentally wrong, but that it requires stronger operational integration: clearer communication of roles, more seamless referral

pathways, better shared systems, and a stronger focus on the business journey across the support landscape rather than within individual agencies alone.

3.7 The role of the National Enterprise Hub in the LEO ecosystem

The National Enterprise Hub is intended to operate as a navigation, simplification and signposting layer within Ireland's wider business support architecture. The LEO Policy Statement presents it as a centralised national entry point through which businesses can access information on Government supports, receive an initial diagnosis of need, and be directed towards the most appropriate agency, scheme or information portal.[3] In that model, the NEH does not replace the LEOs. Rather, it is intended to support and enhance the LEO role as the localised model of entry by making the wider landscape easier to understand.

In principle, this is a coherent addition to the LEO ecosystem. The wider support landscape has become more complex, with businesses potentially needing help on digitalisation, green transition, skills, productivity, finance, innovation and market development across several agencies or schemes. A centralised signposting layer therefore makes sense as a way of reducing search costs and improving navigability, while allowing LEOs to retain their distinctive local role based on proximity, knowledge of place and relationship-based support.

The evidence on how far this is being realised in practice is more mixed. Stakeholder interviews suggest that the underlying rationale for the NEH is understood, but that its additional value is not yet consistently apparent at local level. One senior local LEO stakeholder reported limited interaction with the Hub and suggested that the few referrals received were often already known clients. Similarly, an Enterprise Ireland policy and performance stakeholder described a wider ecosystem in which businesses may hear parallel messages from LEOs, Enterprise Ireland and the NEH, each presenting itself as a route into support.

The Heads of Enterprise focus group gives further support to this cautious judgement. Some participants saw the NEH as potentially duplicating the LEO localised model of support, with one noting that referrals received from the Hub had already been connected to the LEO. The concern was that, unless the relationship with LEOs is clearly defined, the Hub risks becoming **"an extra layer rather than a simplifier".** This does not mean the NEH has no strategic purpose, but it does underline the need to clarify how national triage adds value to, rather than duplicates, local first-contact support.

Taken together, this suggests that the NEH is potentially complementary to the LEO model, but that its role is still bedding in and may not yet be fully resolved in practice. The strongest argument in its favour is as a simplification device for businesses that are unfamiliar with the support system or whose needs cut across multiple agencies and schemes. The main risk is that, if not well integrated and sufficiently resourced, it can appear as an additional front door within an already crowded landscape rather than as a genuine simplifier. On the evidence currently available, the NEH does not appear to undermine the core rationale for LEOs as the localised model of support, but neither is there yet strong evidence that it is consistently making the user journey easier across the system as a whole.

The available survey toplines do not provide strong standalone evidence on NEH awareness or use, so this judgement should be treated as provisional. Nonetheless, the balance of evidence suggests that the NEH has a credible strategic purpose within the LEO ecosystem, but that its complementarity with LEOs depends on whether it is experienced by businesses as a clearer route through the system rather than as another overlapping point of entry.

3.8 Duplication, gaps and navigation in the support landscape

Taken together, the evidence on internal and external coherence suggests that the main challenges in the LEO support landscape are less about wholesale duplication of provision than about ambiguity at the boundaries, uneven progression routes, and difficulties in navigating an increasingly crowded

system. In broad terms, the architecture remains defensible: LEOs occupy a distinct place as a locally delivered, accessible first point of contact for micro and small firms, while other agencies and schemes provide more specialist or later-stage support. However, that broad division of labour does not always translate into a clear and seamless user journey in practice.

A useful distinction can be made between unhelpful duplication and constructive overlap. Unhelpful duplication arises where different parts of the system appear to offer similar entry points or similar messages without sufficient clarity about who is best placed to help. Stakeholder interviews suggest that this is a real issue in parts of the landscape, particularly where LEOs, Enterprise Ireland and the National Enterprise Hub can all appear, from the business perspective, to be routes into support. Focus group participants also highlighted perceived duplication in training provision, citing overlap between LEOs, Skillnet Ireland/networks, Chambers of Commerce, Local Authorities and Education and Training Boards. As one participant put it, **"it is so hard to understand the support ecosystem".**

By contrast, some overlap appears constructive and may be one of the system's strengths. The fact that firms can access advice, mentoring, training and targeted grant support through a locally embedded service, while also being signposted onwards to more specialist provision where needed, is not in itself evidence of duplication. Rather, it reflects the reality that many small firms need layered support rather than a single intervention. The key evaluative question is therefore not whether programmes ever touch similar issues, but whether their relationship is intelligible and value-adding from the user perspective.

The evidence points more clearly to gaps in progression than to major gaps in basic coverage. On paper, the LEO supports span a broad business journey, from start-up, idea testing and early growth through to capability-building, digital adoption, green transition and expansion support. The problem is not that the programme lacks breadth, but that the progression pathways between supports, and between LEOs and more advanced provision, is not always fully realised in practice. Stakeholders identified referral pathways between LEOs and Enterprise Ireland as an area needing improvement, with manual processes, weak CRM infrastructure and fragmented systems limiting smooth handovers and reducing visibility of the overall business journey.

There are also some signs of under-provision or weaker fit for particular needs or business stages. Stakeholder evidence suggests that some supports may work better for certain types of business than others, and that some offers are easier to understand and engage with than others. A senior local LEO stakeholder suggested that export-related support at LEO level could be more practical and easier to use, with more emphasis on shared or sector-based activity. The same stakeholder also raised concerns that mentoring, although highly valued, is under strain because mentor rates have not kept pace with the market and panels are weakening. More broadly, some stakeholders suggested that the current system can become too metric-driven, with volume targets and activity measures shaping delivery choices in ways that are not always fully aligned with business need.

Navigation issues are the most consistent theme across the evidence. Survey data indicate that LEO clients generally rate the service itself positively, but the wider support system appears much less straightforward. As shown in Table 3.3, most respondents said it would have been difficult or very difficult to access similar support elsewhere, while only a small minority said it would have been easy or very easy. This suggests that LEOs are valued in part because they reduce navigation barriers in a system that many businesses do not perceive as easy to access through other routes. Chapter 5 returns to this evidence from an additionality perspective.

Table 3.3 Ease of accessing similar support elsewhere

Grouped response	% of respondents
Difficult / very difficult	59.5%
Easy / very easy	8.1%
Don't know	19.7%

Source: LEO beneficiary survey, Q4.5; analysis by evaluation team.

Stakeholder evidence gives further substance to this point. Feedback from the consultation process/stakeholder engagement highlighted ecosystem complexity, weak signposting and the lack of shared systems as practical barriers to coherence. An Enterprise Ireland policy and performance stakeholder pointed to confusion arising from multiple agencies presenting themselves as the appropriate route into support. A senior local LEO stakeholder described local signposting as strong within their own area, but also suggested that some national additions to the system, particularly the National Enterprise Hub, were not yet clearly adding value in areas where the LEO was already visible and well understood. Across these accounts, the recurring issue is that support may exist, but is not always easy to interpret, sequence or access in a way that feels seamless to businesses.

Overall, the evidence suggests five main conclusions. First, there is some unhelpful duplication at the level of user-facing messages and entry points, even where the underlying institutional roles are distinguishable. Second, there is constructive overlap where multiple supports combine to meet business needs in a staged or complementary way. Third, the most significant gaps relate less to coverage than to progression, especially between local support and more specialist provision. Fourth, some elements of the LEO supports appear to be under strain or less well tailored for specific needs, particularly where support design is influenced by administrative or metric pressures. Fifth, navigation remains a central challenge: LEOs help address it locally, but the wider state-supported landscape still does not consistently appear clear or easily navigable from the business perspective. On that basis, the main improvement priority is stronger integration rather than major LEO supports expansion: clearer role definition, better referral and progression systems, stronger shared data infrastructure, and a more explicit focus on the business journey across the whole support landscape.

3.9 Overall assessment of relevance, coherence and future fit

Overall, the evaluation evidence points to a positive judgement on the continuing rationale and strategic relevance of the LEO model, but to a more qualified judgement on coherence and future fit. The underlying policy rationale remains strong. LEOs continue to address a distinct and important need within the enterprise support system by providing a visible, local and accessible first point of contact for micro and small businesses, including firms that may otherwise struggle to navigate a fragmented support landscape or engage with more specialist provision. In that respect, the core justification for the model has not weakened. If anything, it has become more important as policy expectations of small firms have expanded and as the support landscape has become more complex.

The LEO offer also appears broadly aligned with current strategy and with the needs of intended beneficiaries. The LEO supports reflect the main directions of current enterprise policy, including entrepreneurship, productivity, digitalisation, decarbonisation, support for locally traded sectors, and the development of future exporters. Survey evidence indicates that clients generally view the support as accessible, relevant and professionally delivered, while stakeholder evidence suggests that the breadth of the offer remains valued, especially where it combines advisory, mentoring and practical support within a recognisable local service. On that basis, the chapter's overall judgement is that the LEO model remains relevant and strategically well aligned.

Internal coherence is more mixed. The programme broadly makes sense as a business journey and the main support elements are complementary in concept. However, the evidence suggests that the offer

operates as a fully joined-up pathway more clearly on paper than always in practice. There are still weak progression routes, uneven integration of newer supports, and operational frictions that can make the client journey feel more transactional or fragmented than the overall model intends. Similarly, external coherence with the wider state-supported landscape is defensible in structural terms, but less convincing from the user perspective. The broad division of labour between LEOs, Enterprise Ireland, the National Enterprise Hub and other provision is reasonably clear in policy design, but businesses and stakeholders still report areas of ambiguity, weak referral processes and difficulty navigating the system as a whole.

The overall conclusion on future fit is therefore positive, but conditional. The LEO model appears fundamentally sustainable and adaptable in a more demanding context, and there is no evidence from this chapter to suggest that its core role has been overtaken or undermined. However, the test of relevance and coherence is now more demanding than in earlier years. LEOs are being asked not only to support start-up and early growth, but also to help firms digitalise, decarbonise, strengthen productivity, manage resilience pressures and navigate a more complex support architecture. Meeting that wider role sustainably will require more than preserving the existing model. It will depend on stronger system integration, clearer progression pathways, more consistent delivery, better shared data and CRM infrastructure, and continued clarity about the distinctive value of LEOs within the national enterprise ecosystem.

In that sense, the chapter's central judgement is that the rationale for LEOs remains strong, and the model remains broadly fit for purpose, but maintaining this position will require adaptation and strengthening rather than simple continuity.

4 LEO support scale, reach and support mix

Terms of reference coverage

This chapter mainly addresses the following evaluation objectives from the terms of reference:

- **Objective 2 – Effectiveness:** setting out the available evidence on the scale, reach and activity delivered through the in-scope LEO supports as a basis for assessing performance.
- **Objective 3 – Efficiency:** examining expenditure, resource use, delivery volumes and available output evidence across the LEO supports.
- **Objective 6 – Impacts and additionality:** providing the descriptive baseline needed to interpret later evidence on outcomes, impacts and additionality.

The chapter therefore provides the core descriptive baseline for the evaluation. It examines the scale, expenditure, activity, reach and support mix of the in-scope LEO supports, and identifies what the available monitoring and administrative evidence can, and cannot, tell us about delivery across the LEO supports

4.1 Introduction

This chapter provides an overview of the scale, composition and reach of LEO support activity across the evaluation period, establishing the baseline factual picture against which later assessment of relevance, delivery, outcomes and value for money can be interpreted. In line with the terms of reference, it focuses on the LEO support offer inputs, activities and available output-related evidence across the main support areas in scope, including patterns of expenditure, participation, support mix and beneficiary profile.

This matters analytically because the LEO supports are not a single uniform intervention. Some supports are long-established and high-volume, while others are newer or more targeted. These differences shape both the evidence available and the weight that can reasonably be attached to later findings on effectiveness and impact. Accordingly, the chapter is intended to show what has been delivered, at what scale, to which broad types of businesses, and through which forms of support, while reserving fuller evaluative judgement for later chapters.

4.2 Programme inputs

4.2.1 Programme budget

Table 4.1 summarises the February baseline capital allocation for in-scope LEO supports, together with LEO drawdown and actual expenditure over the period 2015 to 2025. The figures should be interpreted as an indication of the scale and evolution of capital funding for in-scope supports, rather than as a conventional measure of annual budget utilisation. The baseline allocation shown is the figure set in February of each year and was typically amended during the year in response to demand, approvals and wider budget management processes. The figures also relate only to the capital allocation for in-scope supports and do not include LEO staffing or wider management costs.

On this basis, the data confirm that LEOs collectively spent €265.7 million on in-scope supports between 2015 and 2025, compared with a February baseline allocation of €229.2 million. Actual expenditure exceeded the February baseline in most years, reflecting the demand-led and adjustable nature of the funding model rather than necessarily indicating overspend. The table is therefore most useful as evidence of the overall level of public investment in in-scope supports and the growth in expenditure over time, rather than as a robust basis for assessing budget utilisation or efficiency.

No expenditure is shown for 2014 as this was the establishment and start-up year for the LEO model, with the programme still being mobilised and the current reporting series beginning from 2015.

Table 4.1 In-scope programme budget, 2015-25

Year	In scope baseline budget allocation	LEO draw down	LEO actual expenditure
2025	€34,986,000	€40,671,643	€36,810,460
2024	€30,479,250	€31,638,031	€28,287,827
2023	€23,589,937	€27,353,520	€26,097,855
2022	€21,999,781	€20,560,079	€25,874,926
2021	€21,000,000	€34,832,929	€27,885,584
2020	€18,500,000	€23,700,857	€21,918,978
2019	€16,110,630	€18,634,857	€22,247,256
2018	€16,168,849	€17,518,858	€21,152,714
2017	€16,943,849	€17,714,674	€19,208,771
2016	€14,609,000	€17,541,102	€18,721,006
2015	€14,772,281	€15,331,476	€17,459,812
Totals	**€229,159,577**	**€265,498,026**	**€265,665,189**

Source: Enterprise Ireland monitoring data

Note: Baseline allocation refers to the February capital allocation for in-scope supports only. It excludes LEO staffing and wider management costs. As allocations were typically amended in-year, the baseline figure should not be treated as the final annual budget or used as a standalone measure of budget utilisation. In-Scope includes: M1, EEG, M2, Grow Digital, Green & Digital. Out of Scope includes: TAME, Export Business Advisor, Network Project Activity, Promotions, Customs Training, TOV, Graduate, Lean & Primary Schools

4.2.2 Actual expenditure

Table 4.2 shows that total LEO expenditure increased from €31.6 million in 2015 to €64.4 million in 2025, while expenditure on the supports in scope for this evaluation rose from €17.5 million to €36.8 million. This represents growth of 104% in total spend and 110% growth in in-scope spend over the period. In-scope supports accounted for 55% of total expenditure in 2015 and 57% in 2025. The main exception to the general pattern occurred in 2020, when total expenditure rose sharply due to Covid-related expenditure outside the scope of this evaluation.

Overall, the expenditure evidence points to a set of in-scope supports that has expanded substantially in scale and shifted in composition. As shown in Table 4.3, growth among the longer-established supports has been strongest in the **Business Expansion Grant** (+126%), **Feasibility Grant** (+89%) and **Mentoring** (+78%). **Training, Networking and Management Development** also increased significantly (+60%), while **SYOB** increased more modestly (+25%). In contrast, **Priming Grant** expenditure fell by 16% comparing 2025 with 2015. This is consistent with the wider strategic shift identified in Chapter 3 towards capability-building, transition and growth support alongside more traditional start-up assistance.

In 2025, the largest in-scope expenditure area was the **Business Expansion Grant**, which accounted for **€9.4 million** or **26%** of total in-scope spend. This was followed by **Training, Networking and Management Development** at **€6.9 million** or **19%**, the **Energy Efficiency Grant** at **€5.2 million** or **14%**, and **Priming Grant** at **€4.5 million** or **12%**. **Mentoring** remained a substantial advisory support at **€3.2 million** or **8%**. Newer green and digital supports now account for a more visible share of in-scope expenditure than previously, particularly through the Energy Efficiency Grant, Digital for Business and Green for Business. Overall, expenditure remains weighted towards business growth, capability-building, transition support and advisory assistance, while still retaining early-stage and start-up elements.

Table 4.2 Overall expenditure on LEO activities and in-scope supports, 2015 and 2025

Year	Total spend (€m)	In scope spend (€m)	In scope share of total
2015	31.6	17.5	55%
2025	64.4	36.8	57%
% change	104%	110%	+2 percentage points

Source: Enterprise Ireland monitoring data; analysis by evaluation team.

Table 4.3 Expenditure on in-scope supports, 2015 and 2025

Support	2015 (€m)	2025 (€m)	% change	% of total LEO in scope spend, 2025
Business Expansion Grant	4.2	9.4	126%	26%
Priming Grant	5.4	4.5	-16%	12%
Feasibility Grant	1.0	1.9	89%	5%
Energy Efficiency Grant	0.0	5.2	n/a	14%
Grow Digital Voucher	0.0	0.3	n/a	1%
Mentoring	1.8	3.2	78%	9%
(SYOB	0.8	1.0	25%	3%
Training, Networking & Management	4.3	6.9	60%	19%
Digital for Business	0.0	2.2	n/a	6%
Green for Business	0.0	2.3	n/a	6%

Source: Enterprise Ireland monitoring data; analysis by evaluation team

4.3 Programme activities and outputs

4.3.1 Evidence review

For the purposes of this evaluation, **outputs are understood as the direct units of activity delivered through LEO supports**. These include, for example, participants trained, businesses receiving mentoring, clients approved for support, clients paid, or grant-supported businesses. Outcomes are the subsequent changes for businesses, such as improved productivity, sales, profitability, management capability, digital adoption, environmental performance or resilience.

On this basis, the available monitoring data provide useful evidence on the **scale and mix of outputs delivered** across the LEO supports. However, the strength and consistency of this evidence varies by support. For some supports, there are routinely recorded participant or approval measures, while for others these are captured mainly through payments data. These measures are useful for understanding delivery scale, but they do not by themselves show the quality, intensity, completion, progression or outcomes of support.

The main routinely recorded measures available from 2015 onwards relate to the number of clients captured in the Annual Employment Survey (AES), total jobs, gross job gains, gross job losses and net new jobs among AES firms (Measure 1 grant recipients), training participants, mentoring participants, and clients approved for selected green and digital supports. In addition, the evaluation team has been provided with data on the number of clients paid for each LEO support from 2015 to 2025. This extends coverage across the grant schemes, but measures payments rather than completed projects or business outcomes and has no associated target framework.

Overall, this is a useful but uneven output evidence base. Training and mentoring data provide direct measures of participant volumes, though they do not always represent unique businesses or the intensity of support received. Approval figures for newer digital and green schemes show uptake, though not necessarily completion or implementation. For Priming Grant, Feasibility Grant and Business Expansion Grant, clients paid and payment values provide useful evidence on grant-supported businesses, but do not show the nature, quality or results of the supported projects. Start Your Own Business is comparatively weaker from a support-specific monitoring perspective because routine LEO-level output data are limited and participants are not necessarily unique businesses.

There are also comparability limitations. A training participant is not equivalent to a mentored business, a grant-supported firm, or a client approved for a digital or green support. Participation measures may include repeat engagement; mentoring counts do not capture the depth or quality of mentoring; approval figures are unique only within each year; and payment figures measure administrative transactions rather than outcomes achieved. Monitoring arrangements have also evolved over time, including the introduction of a revised metrics framework in 2022.

Tables 4.4 and 4.5 therefore show that the routine monitoring system is useful for describing **outputs and delivery volumes**, but less well suited to assessing outcomes, additionality or comparative effectiveness. The AES measures are useful for understanding the scale of the supported business base and broad (non-attributable) employment trends, while participant, approval and payment measures help show the volume and composition of support delivered. However, many of these measures are not directly comparable across supports and are not consistently linked to business outcomes.

Taken scheme by scheme, the strongest routine output coverage is for mentoring, training and the newer digital and green schemes, where annual figures are available for participants or clients approved. Coverage is more limited for the long-established grant schemes, where the main administrative evidence is clients paid and payment values rather than completed project outputs or outcome measures. Start Your Own Business is also comparatively weak from an output-tracking perspective, as there is no consistently evidenced LEO-level measure focused on completed programmes or businesses started.

The available data are therefore sufficient to describe broad patterns of output delivery and changes in support mix over time. They are less suited to comparative judgements about the effectiveness or value of individual supports unless combined with survey, stakeholder and outcome evidence, as considered in later chapters.

The output measures used in this chapter are not directly comparable across supports. “Participants” refers to recorded participation in training or mentoring activity and may include repeat engagement by the same business. “Clients approved” refers to businesses approved for a support in a given year, but does not necessarily show completion or implementation. “Clients paid” refers to businesses receiving payment and is mainly used for grant schemes; it is an administrative payment measure rather than a direct outcome measure. “Unique businesses” is used only where the data identify distinct businesses, such as the number of businesses captured in the Annual Employment Survey.

Differences between draw down and the number of businesses supported should also be interpreted with care (discussed in more detail in chapter 7). A support may account for a relatively high share of draw down but a lower share of businesses supported where the average value of support per business is higher. For example, grant-based supports such as the Priming Grant are likely to involve larger individual awards than lower-cost advisory or training supports. Conversely, lower-cost or lighter-touch supports may reach larger numbers of businesses with lower overall draw down.

Table 4.4 Routine output measures available for the 31 LEOs

Metric	Definition	Relevance / limitation for evaluation
Number of clients	Number of unique businesses included in the Annual Employment Survey (AES) for each LEO	Useful programme-level measure of supported business base, but not specific to individual in-scope supports
Total jobs	Total number of jobs reported by AES businesses	Useful for overall scale of supported employment, but not attributable to specific supports
Gross job gains	New jobs reported by AES businesses compared with the previous year	Useful indicator of employment change, but influenced by wider market conditions and not specific to scheme
Gross job losses	Jobs lost by AES businesses compared with the previous year	Useful context for net change, but again not specific to support or attributable in a causal sense
Net new jobs	Gross job gains minus gross job losses	Important headline programme measure, but limited as an indicator of individual scheme effectiveness
Training participants	Number of client participations in training sessions	Useful output measure, but not unique businesses and does not show training quality, completion or outcomes
Mentoring participants	Number of clients receiving a block of mentoring	Useful output measure, but does not show mentoring intensity, quality or outcomes achieved
Clients approved for Green for Business	Number of clients approved in a given year	Scheme-specific uptake / output measure, but does not show completion or implementation
Clients approved for Energy Efficiency Grant	Number of clients approved in a given year	Scheme-specific uptake / output measure, but does not show completion, investment delivered or energy outcomes
Clients approved for Digital for Business	Number of clients approved in a given year	Scheme-specific uptake / output measure, but does not show completion or digital changes implemented
Clients approved for Grow Digital Voucher	Number of clients approved in a given year	Scheme-specific uptake / output measure, but limited evidence on implementation and outcomes
Clients paid by scheme	Number of businesses receiving payments by year and by LEO	Valuable administrative output / payment measure for grant schemes, but does not show project quality, completion or outcomes

Source: Enterprise Ireland monitoring data; analysis by evaluation team.

Table 4.5 Output evidence available by in-scope support

In scope support	Main routine output evidence available	Evidence strength	Main limitation
Start Your Own Business	Headline programme and participant figures nationally	Weak to moderate	Participants are not necessarily unique businesses; limited routine LEO-level evidence on completions or businesses started
Priming Grant	Number of clients paid; value of payments by year and LEO	Moderate	Payment data identify grant-supported businesses but not project quality, completion or business outcomes
Feasibility Grant	Number of clients paid; value of payments by year and LEO	Moderate	Payment data identify supported projects but not whether feasibility work led to subsequent development or investment
Business Expansion Grant	Number of clients paid; value of payments by year and LEO	Moderate	Payment data identify supported firms but not the scale, quality or outcomes of expansion projects
Digital for Business	Number of clients approved	Moderate	Approval data show uptake but not completion, implementation or digital changes achieved
Grow Digital Voucher	Number of clients approved; number of clients paid	Moderate	Approval / payment data available, but limited direct evidence on implementation or business outcomes
Green for Business	Number of clients approved	Moderate	Approval data show uptake but not completion, implementation or environmental outcomes
Energy Efficiency Grant	Number of clients approved; number of clients paid	Moderate	Approval / payment data available, but limited evidence on investments completed, energy savings or environmental outcomes
Mentoring	Mentoring participants	Moderate	Useful output measure, but not a measure of mentoring intensity, quality or business outcomes
Training, Networking and Management Development	Training participants	Moderate	High-volume output measure, but not unique businesses and not a measure of learning, application or outcomes

Source: Enterprise Ireland monitoring data; analysis by evaluation team.

4.3.2 Available output-related trends

Within these limits, the administrative series shows substantial scale and growth in a number of support outputs. Between 2015 and 2025, the number of businesses paid increased by 53% for the Business Expansion Grant and by 34% for the Feasibility Grant, while falling by 47% for the Priming Grant, in line with broad trends for expenditure by support. (Table 4.6) For non-financial supports, participant volumes increased strongly, with mentoring participants rising from 8,175 to 16,628, Start Your Own Business participants from 3,411 to 5,684, and Training, Networking and Management Development participants from 27,185 to 44,209 (Table 4.7).

These trends suggest a growing emphasis on higher-volume advisory and capability-building outputs, alongside some shift within the grant programme towards business expansion rather than early-stage priming support. They are also consistent with the wider strategic direction identified in Chapter 3, in which the LEO role has broadened towards capability-building, digitalisation, sustainability and business resilience as well as start-up support.

Stakeholder evidence helps explain why some of the highest volume supports appear particularly prominent in both the administrative and survey evidence. Interviewees consistently pointed to the

value of mentoring, local advice and practical support that businesses can access without needing to enter a complex or highly selective programme. This is useful context for interpreting the scale of mentoring and training outputs: these supports appear to function not only as stand-alone interventions, but also as accessible entry points into the wider LEO offer.

The AES measures provide the main consistent source of programme-level employment evidence for the 31 LEOs. Across the period 2015 to 2025, LEO-supported firms accounted 80,907 gross job gains, 49,724 gross job losses, and a cumulative 30,137 net new jobs. These figures provide an important indication of the scale of employment associated with LEO-supported businesses over time (see Tables 4.8 and 4.9).

The AES employment figures should be read as an indicator of reported employment associated with supported businesses, rather than as a direct measure of jobs caused by the programme. While they provide useful context on the scale of business growth reported through the scheme, attribution is uncertain because employment change may also reflect wider market conditions, business-specific factors and activity that may have happened without support.

Table 4.6 Summary trends in grant support outputs, 2015–2025

Support	2015	2025	% change	Caveat
Business Expansion Grant	319	488	+53%	Measures businesses paid, not project quality, completion or outcomes
Feasibility Grant	158	211	+34%	Measures businesses paid, not whether feasibility work led to subsequent development or investment
Priming Grant	492	263	-47%	Measures businesses paid, not project quality, completion or outcomes
Energy Efficiency Grant	0	641	n/a	Support introduced later in period; approval/payment measure rather than completed outcomes
Grow Digital Voucher	0	106	n/a	Support introduced later in period; approval/payment measure rather than implemented digital outcomes

Source: Enterprise Ireland monitoring data; analysis by evaluation team.

Table 4.7 Summary trends in non-financial support outputs, 2015–2025

Support	2015	2025	% change	Caveat
Mentoring	8,175	16,628	+103%	Participants / clients, not mentoring intensity, quality or outcomes
Start Your Own Business	3,411	5,684	+67%	Participants are not necessarily unique businesses or confirmed business starts
Training, Networking and Management Development	27,185	44,209	+63%	Participation count, not unique businesses or learning outcomes. Includes SYOB.
Green for Business	0	1,094	n/a	Support introduced later in period; approvals rather than completed environmental changes
Digital for Business	0	1,134	n/a	Support introduced later in period; approvals rather than completed digital changes

Source: Enterprise Ireland monitoring data; analysis by evaluation team.

Table 4.8 AES-based employment measures available for the LEO supports

Measure	What it shows	Main evaluative use	Main limitation
Number of clients in AES	Size of supported firm base covered by survey	Scale of supported programme	Not specific to in-scope schemes
Total jobs	Employment supported within AES firm base	Broad employment contribution	Programme-level only
Gross job gains	Jobs added by AES firms compared to previous year	Helps show business growth dynamics	Not attributable to specific support
Gross job losses	Jobs lost by AES firms compared to previous year	Context for net change	As above
Net new jobs	Overall annual employment change across AES firms	Important headline performance measure	Not a direct measure of scheme impact. 'Net' reflects gross job gains minus gross job losses, rather than 'net' jobs attributable to LEO supports.

Source: Enterprise Ireland AES monitoring data; analysis by evaluation team

Table 4.9 AES headline jobs measures for the LEO supports, 2015–2025

Measure	Total, 2015 2025
Gross job gains	80,907
Gross job losses	49,724
Net new jobs	30,137

Source: Enterprise Ireland AES monitoring data; analysis by evaluation team.

4.3.3 Beneficiary survey evidence on reach and take-up

Administrative data provide the main evidence on expenditure, payments, approvals and participation volumes. The beneficiary survey adds a different perspective: who responded, which supports they used, when they first engaged with LEOs, and which supports they regarded as most important. It should therefore be read as evidence on the beneficiary profile and perceived support mix, rather than as a substitute for administrative delivery data.

The survey suggests that the beneficiary base is weighted towards more established firms (Table 4.10). Of respondents answering the business stage question, 41.8% described themselves as mature businesses of 10 or more years old and a further 18.9% as established businesses of 5–10 years old, compared with 6.4% who were not yet established. The sample is also overwhelmingly composed of stand-alone businesses rather than subsidiaries or branch operations, with 95.1% indicating that they were not part of a larger parent organisation.

In terms of timing, 37.5% of respondents first received LEO support more than five years ago, while 21.7% had first received support within the last year. This suggests that the survey is particularly useful for understanding longer-term support relationships and accumulated support pathways, rather than only recent entrants to the system (Table 4.11).

The survey also helps show the mix of support received and its perceived importance (Table 4.12 and 4.13). Among respondents answering the support receipt question, the most frequently reported supports were the Mentor Programme, Digital for Business / Grow Digital Voucher, Start Your Own Business Programme and Training, Networking and Management Development Support. When asked which supports had been most important, Mentor Programme again ranked highest, followed by Start

Your Own Business Programme and Digital for Business / Grow Digital Voucher, and Business Expansion Grant.

This is useful in showing that beneficiary perceptions do not simply mirror administrative volumes. Mentoring via the Mentor Programme, in particular, appears especially prominent in perceived value. This prominence is consistent with the Heads of Enterprise focus group, where participants described mentoring as one of the most valuable elements of the LEO offer, partly because it develops softer business skills and, in some cases, as it may help prevent business closure.

The survey also provides a useful basis for interpreting targeting and support pathways. The Start Your Own Business Programme is most prominent among businesses not yet established and recent starts, while Digital / Grow Digital and Business Expansion Grant are more prominent among established and mature firms. Of particular note, the Mentoring Programme is important across all business stages, suggesting that it operates as a cross-cutting support rather than one confined to a single stage of the business journey.

Taken together, the beneficiary survey supports interpretation of the administrative data by showing that the LEO support mix varies in expected ways by business stage, while also highlighting the cross-cutting importance of mentoring and the perceived value of digital and start-up supports within the wider beneficiary base. This picture is also consistent with stakeholder views that the LEO model is valued partly because it offers a visible, locally accessible route into support, particularly for firms that may not yet be ready for more specialist or nationally oriented provision.

Table 4.10 Beneficiary survey respondent profile

Indicator	*n*	%
Business stage		
Business not yet established	117	6.4
Recent start (0–2 years old)	283	15.6
Early stage (2–5 years old)	313	17.2
Established (5–10 years old)	344	18.9
Mature (10+ years old)	759	41.8
Business structure		
Not a subsidiary / branch	1,723	95.1
Subsidiary / branch	56	3.1
Don't know	33	1.8

Source: LEO beneficiary survey, Q1.1 and Q1.3; analysis by evaluation team. Percentages are based on valid responses to each question

Table 4.11 Timing of first LEO support

When first received support	*n*	%
Up to 1 year ago	385	21.7
1 to 2 years ago	276	15.5
2 to 5 years ago	450	25.3
More than 5 years ago	666	37.5

Source: LEO beneficiary survey, Q2.2; analysis by evaluation team. Percentages are based on valid responses, n=1,777

Table 4.12 Main supports received and most important supports

Support	Received *n*	Received %*	Most important *n*	Most important %**
Mentor Programme	867	48.2	504	28.6
Digital for Business / Grow Digital Voucher	588	32.7	357	20.3
Start Your Own Business Programme	561	31.2	358	20.3
Training, Networking and Management Development Support	519	28.9	312	17.7
Business Expansion Grant	379	21.1	324	18.4
Priming Grant	329	18.3	252	14.3
Feasibility Grant	250	13.9	176	10.0
Green for Business / Energy Efficiency Grant	244	13.6	137	7.8

** Percentage of respondents answering Q2.4 (n=1,797).*
*** Percentage of respondents answering Q2.6 (n=1,762).*
Source: LEO beneficiary survey, Q2.4 and Q2.6; analysis by evaluation team. Percentages are based on respondents answering each multi-response question. Respondents could select more than one support.

Table 4.13 Selected supports received by business stage (% within each stage)

Support	Not yet established (%)	0 2 years (%)	2 5 years (%)	5 10 years (%)	10+ years (%)
Start Your Own Business Programme	57.3	45.2	34.5	31.1	19.9
Mentor Programme	43.6	48.4	52.4	50.3	44.9
Training, Networking and Management Development Support	21.4	21.2	30.0	29.4	31.5
Digital for Business / Grow Digital Voucher	6.0	13.8	28.4	32.3	44.9
Business Expansion Grant	2.6	3.9	17.9	31.4	26.5

Source: LEO beneficiary survey, Q1.1 and Q2.4; analysis by evaluation team. Percentages are calculated within each business-stage group.

4.4 Conclusion

Taken together, the evidence in this chapter shows that the LEO supports operated at significant scale, with a support mix that has evolved over time towards a broader combination of business growth, capability-building, digital and green supports. The available administrative and monitoring data provide useful evidence on the scale and composition of direct outputs delivered across the LEO supports, including participants trained, businesses mentored, clients approved, clients paid and the value of payments made.

The evidence also indicates that the programme is not uniform across either schemes or places. Some supports are more established, visible and high-volume than others, and there is substantial variation across LEO areas in both expenditure and output volumes. This variation should be interpreted cautiously, as it may reflect differences in local enterprise bases and support needs, but also differences in promotion, delivery capacity, administrative processes, timing and the ability to convert approvals into spend within a given year.

For the evaluation objectives, the chapter provides an important baseline on reach, scale, expenditure, support mix and direct output delivery. It also highlights issues that matter for later analysis of relevance, coherence, efficiency and effectiveness, including the balance between national consistency and local responsiveness, the prominence of advisory and mentoring supports, and the uneven strength of the evidence base across the in-scope LEO supports.

The chapter therefore shows that the LEO supports have significant scale and reach, but also that the current administrative evidence is stronger for describing expenditure, output volumes and participation than for assessing support quality, client progression, business outcomes or additionality. These limitations shape the interpretation of the outcome, delivery and value for money evidence considered in the chapters that follow.

The data in this section should be read primarily as evidence of the scale, reach and evolution of programme activity, rather than as direct evidence of outcomes. Measures such as participants, approvals and payments help to show how the programme was delivered and where activity was concentrated. The later outcomes, impact and value-for-money analysis therefore uses this output data as contextual evidence, alongside survey findings, stakeholder feedback, case study material and available performance information.

5 Outcomes, impacts, additionality and sustainability

Terms of reference coverage

This chapter mainly addresses the following evaluation objectives from the terms of reference:

- **Objective 2 – Effectiveness:** assessing the benefits delivered by LEO supports against their intended outputs, outcomes and impacts.
- **Objective 5 – Sustainability:** considering whether reported benefits are likely to endure, including effects on business capability, resilience, systems change and investment readiness.
- **Objective 6 – Impacts and additionality:** evaluating, and where possible quantifying, the impacts and additional benefits of the supports distributed to LEO client companies.

The chapter therefore examines the evidence on business-level outcomes, including changes in capability, confidence, productivity, sales, exports, employment and investment, and considers the extent to which these outcomes can reasonably be attributed to LEO support.

5.1 Introduction

Having set out the scale, reach and support mix of the LEO supports in the previous chapter, this chapter turns to the question of what those supports appear to have achieved for beneficiary businesses over the evaluation period. It examines outcomes and impacts across the LEO supports, including business performance, innovation, digital and green change, capability and skills, and wider business resilience. It also considers additionality and sustainability, in line with **Objective 2 on effectiveness**, **Objective 5 on sustainability**, and **Objective 6 on impacts and additionality**.

The chapter takes a broad view of outcomes, covering both harder 'bottom-line' business performance effects and softer or enabling changes, such as improved confidence, management capability, networking and readiness for further development. It draws on a mixed evidence base, including administrative data, beneficiary survey findings, stakeholder perspectives and programme documentation. As the strength of evidence varies across the LEO supports, the chapter adopts a proportionate approach and focuses on the likely contribution of LEO support to business development, rather than attempting to isolate net causal effects with high precision. It therefore distinguishes, where possible, between clearly evidenced effects, self-reported benefits and broader evaluative judgements about the role of support in shaping outcomes.

5.2 Business performance and productivity

A central question for the evaluation is whether the in-scope LEO supports appear to have contributed to improved business performance for beneficiaries, and whether there is evidence of value beyond what firms would have achieved anyway. Across the LEO supports, the evidence points to a broadly positive pattern, though one that varies by support type and is stronger in some fields than others. The clearest reported effects relate to productivity, sales, profitability and business resilience, with more mixed evidence on employment growth and relatively limited evidence on export effects.

This pattern is consistent with the character of the LEO supports, which is weighted towards small firms, locally traded businesses and capability-building supports, rather than towards export-oriented interventions alone. It also suggests that softer and enabling effects, such as stronger management capability, improved knowledge and greater confidence, are often part of the pathway through which harder business outcomes are achieved.

At programme level, beneficiary survey evidence indicates that a substantial minority of respondents report positive business performance effects overall. As shown in Table 5.1, reported effects are strongest for productivity, sales turnover, profitability and safeguarding existing jobs. Reported effects

on direct job creation are lower, while reported export effects are weaker still. These findings suggest that, across the LEO supports as a whole, LEO support is more clearly associated with improving how firms operate and perform than with immediate large-scale employment or export growth.

The wider-benefits evidence reinforces this pattern. As shown in Table 5.2, commonly reported effects include improved business knowledge and skills, better knowledge of available supports, stronger networks and contacts, greater operational capacity and improved management capability. For many smaller firms, these are important mechanisms through which improved performance may be realised.

The survey evidence also points to variation across support types. As shown in Table 5.3, reported business performance effects are strongest for the Business Expansion Grant, which is most closely associated with conventional growth outcomes such as productivity, sales, profitability and employment. Priming Grant, Feasibility Grant, Mentoring, and Training, Networking and Management Development also show positive patterns across several performance measures. Digital for Business / Grow Digital Voucher is associated with reported gains in productivity, sales and profitability, though less strongly for employment and export sales. Green for Business / Energy Efficiency Grant shows a more modest pattern on conventional business performance measures, which is unsurprising given that its primary purpose is often to support efficiency, sustainability and resilience rather than immediate turnover or employment growth.

Heads of Enterprise focus group evidence provides further qualitative support for these findings. Participants highlighted the Energy Efficiency Grant, Green Audit and lean-type supports as areas where impacts were particularly visible, especially through reduced costs, improved competitiveness and bottom-line benefits for firms. One participant summarised this as evidence that **"energy efficiency and lean supports deliver meaningful impacts".**

There is also indicative survey evidence of additionality. The counterfactual questions suggest that, among businesses able to provide estimates, reported turnover and employment would often have been lower in the absence of support. As shown in Table 5.4, the median reported annual turnover among matched respondents was around €250,000, compared with a median counterfactual estimate of €200,000 without support. For employment, the median was three employees, compared with a counterfactual of two employees. These differences are modest and should be interpreted cautiously. They are based on self-reported counterfactual estimates and are therefore vulnerable to recall bias, optimism bias and respondent interpretation. However, they point in a direction consistent with positive contribution, and, given the high number of businesses supported in aggregate across the 31 LEOs, the cumulative turnover and job creation increases are substantial.

This is reinforced by evidence on alternative provision. As shown in Chapter 3, a majority of respondents said it would have been difficult or very difficult to access similar support elsewhere. Taken together, these findings strengthen the case that at least some of the reported business effects are additional, in the sense that they were unlikely to have been replicated as easily through alternative provision.

Stakeholder evidence is broadly consistent with this pattern. Feedback from the consultation process/stakeholder engagement described the LEOs as providing a valuable and needed service, especially through local knowledge, mentoring and support for smaller firms, and suggested that mentoring may be among the most valued elements of the offer. The stakeholder evidence also supports the view that LEO impacts often arise through a combination of practical advice, local accessibility, confidence-building and hands-on developmental support rather than through grant funding alone. This adds useful texture to the survey findings: the business effects reported by beneficiaries appear to reflect not only direct financial assistance, but also the wider relationship-based support model embedded within the 31 LEOs.

Overall, the evidence on business performance and productivity is positive but necessarily qualified. There is credible survey and stakeholder evidence that the LEO supports have contributed to improved business performance for many beneficiaries, with particularly strong indications around productivity,

sales, profitability and business capability. There is also indicative evidence of additionality, both from the counterfactual questions and from the reported difficulty of accessing comparable support elsewhere. However, much of the evidence is self-reported, the strength of response varies across support types, and some wider business effects cannot be attributed cleanly to support alone. The most balanced judgement is therefore that LEO supports appear to have generated clear value for a substantial share of beneficiaries, but that this value is often realised through incremental improvement, stronger capability and improved resilience rather than through uniform or easily measurable headline impacts.

The survey findings in this chapter are based on beneficiary responses and should not be read as equivalent to administrative output measures such as clients approved, clients paid or training participants. A respondent may have received more than one support, and support-level findings are based on those respondents who reported receiving the relevant support. The tables therefore show reported outcomes among surveyed beneficiaries, not administrative counts of unique businesses supported, approvals made or payments completed.

Table 5.1 Reported overall business performance effects of LEO support

Reported effect	% saying yes*
Increased productivity	47%
Increased sales turnover	43%
Increased profitability	38%
Allowed the business to safeguard existing jobs	37%
Allowed the business to employ additional people	29%
Increased export sales	20%

** Percentage of valid yes/no responses; excludes "Don't know / not relevant".*
Source: LEO beneficiary survey, Q3.24; analysis by evaluation team

Table 5.2 Reported wider business benefits of LEO support overall

Wider benefit	% agreeing / strongly agreeing*
Improved business knowledge and skills	48%
Enhanced knowledge of external support available	44%
Enhanced business networks and contacts	35%
Enabled increase in operational capacity	32%
Improved management capability	32%
Increased resilience to cope with internal and external changes	31%
Enhanced the sustainability of the business	29%
Encouraged additional investment in the business	23%

** Percentage of all responses to each item; includes "don't know / not relevant" in the denominator, so these figures are conservative.*
Source: LEO beneficiary survey, Q3.23; analysis by evaluation team

Table 5.3 Reported performance effects by support type (% saying yes, selected measures)

Support type	Productivity	Sales turnover	Profitability	Additional people employed
Start Your Own Business	66.1%	55.6%	57.3%	35.8%
Priming Grant	89.9%	91.3%	79.1%	72.7%
Feasibility Grant	83.3%	82.3%	73.3%	56.0%
Digital / Grow Digital	83.8%	80.4%	75.6%	42.6%
Green / Energy	67.5%	54.9%	80.9%	24.3%
Mentoring	82.6%	70.4%	68.3%	46.5%
Training / networking / management	85.2%	73.1%	72.2%	57.2%
Business Expansion Grant	94.0%	94.2%	85.1%	91.6%

Source: LEO beneficiary survey, Q3.3, Q3.5, Q3.8, Q3.12, Q3.16, Q3.18, Q3.20 and Q3.22; analysis by evaluation team. Percentages show "Yes" responses and exclude "Don't Know / Not Relevant".

Table 5.4 Indicative additionality from counterfactual survey questions

Indicator	Actual	Counterfactual without support
Median annual turnover (matched respondents)	€250,000	€200,000
Median employment (matched respondents)	3	2

Source: LEO beneficiary survey, Q4.1, Q4.2, Q4.3 and Q4.4; analysis by evaluation team

5.3 Innovation, digital and green change

A further question for the evaluation is whether the LEO supports appear to have supported innovation, operational improvement and transition-related change within beneficiary firms, and whether there is evidence of wider added value beyond immediate business performance effects. Here, the clearest evidence is at business level rather than industry level. Across the in-scope supports, the available survey and stakeholder evidence points to positive effects on product, service and process development, digital adoption, investment readiness and operational change. By contrast, the evidence base is not well designed to capture wider industry-level effects such as spillovers, diffusion across firms, or changes in sector-level innovation performance.

The clearest cross-cutting signals relate to business improvement and capability for change. In the overall survey question on wider benefits from LEO support, respondents most often reported improvements in business knowledge and skills, knowledge of external support available, business networks and contacts, operational capacity, management capability, resilience and business sustainability. These are not innovation outcomes in a narrow research and development (R&D) sense, but they are relevant indicators of innovation-readiness and adaptability, particularly for the small and micro businesses that make up much of the LEO client base. They suggest that the LEO contribution often lies in helping firms become more informed, more connected and more able to act on development opportunities, rather than only in generating immediate measurable commercial innovation.

Support-specific survey findings reinforce this pattern. As shown in Table 5.5, Priming Grant and Feasibility Grant are associated with product, service or process development, idea validation, feasibility assessment and readiness for next-stage investment. This suggests that both supports are contributing to innovation at an early stage by helping firms test ideas, assess markets and prepare for the next stage of investment or development.

The evidence is especially strong for the digital supports. Digital for Business / Grow Digital Voucher respondents reported strong benefits in relation to understanding digital opportunities, using digital tools, improving business processes and investing in new digital systems. These findings point to a package that is supporting practical digital transformation within firms rather than simply awareness-raising. The pattern also aligns with stakeholder feedback. An external delivery partner for lean, digital and green supports described Digital for Business support as part of a broader pathway from diagnosis to implementation, often followed by Grow Digital and then green support where relevant. At the same time, this stakeholder argued that current metrics focus too heavily on counts of activity, meaning that some of the more substantive changes within firms are not well captured by the monitoring system.

There is also positive evidence that the programme supports business development and investment readiness more broadly. Business Expansion Grant respondents reported particularly strong effects on additional investment, operational capacity and resilience. This suggests that the support is contributing to business-level expansion and strengthening firms' ability to undertake and absorb further change. Green for Business / Energy Efficiency Grant is less strongly captured through conventional innovation metrics, but later evidence in this chapter suggests that it contributes to environmental awareness, cost-saving opportunities, operational resilience and embedded sustainability practice.

From an additionality perspective, the evidence is positive but necessarily indicative. The survey responses suggest that a substantial share of businesses report changes that are plausibly additional, particularly where supports are designed to address capability gaps, de-risk investment decisions or provide structured expert input that firms would struggle to source elsewhere. This is especially apparent for feasibility, digital and business expansion supports, where reported effects relate not only to immediate performance but to clearer decision-making, stronger readiness and greater capacity to invest.

At the same time, the evidence for industry-level innovation effects remains limited. The available data do not provide a robust basis for assessing whether LEO supports have changed innovation performance at sector level, stimulated significant spillovers across firms, or altered wider patterns of collaboration or competitiveness in local industries. There are some suggestive signs, for example reported gains in networks and contacts, stakeholder references to support pathways across lean, digital and green programmes, and the growing prominence of transition-focused supports, but these are not sufficient to support strong claims about system- or industry-level impact.

Overall, the evidence on innovation, digital and green change is positive. The LEO supports appear to have supported business-level innovation and improvement in a broad sense, including the development of new products, services and processes, stronger digital adoption, improved efficiency, greater investment readiness and increased operational capacity. The clearest reported evidence comes from Priming, Feasibility, Digital / Grow Digital and Business Expansion supports, each of which appears to contribute at different stages of the business journey. However, the evidence is still largely self-reported, and the current monitoring system is not well designed to capture these effects consistently. The strongest conclusion is therefore that LEO supports appear to add value in helping firms innovate, modernise and prepare for further development, but that this contribution is more clearly evidenced at business level than at industry level.

Table 5.5 Reported innovation- and change-related benefits by support type (% agreeing / strongly agreeing, excluding "Don't know / Not relevant")

Benefit	Priming Grant	Feasibility Grant	Digital / Grow Digital	Business Expansion Grant
New products, services or processes	79.3%	81.9%	75.8%	n/a
Improved operational capacity	94.1%	n/a	n/a	96.0%
Encouraged additional investment	79.9%	n/a	n/a	87.0%
Improved readiness for next-stage investment	n/a	82.4%	n/a	n/a
Improved understanding of demand / feasibility	n/a	83.4%–85.5%	n/a	n/a
Improved understanding of digital opportunities	n/a	n/a	83.0%	n/a
Improved use of digital tools in operations	n/a	n/a	81.8%	n/a
Improved efficiency of business processes	n/a	n/a	71.6%	n/a
Enabled investment in new digital systems	n/a	n/a	73.8%	n/a

Source: LEO beneficiary survey, Q3.4, Q3.7, Q3.11 and Q3.21; analysis by evaluation team. Percentages show "Agree" or "Strongly Agree" responses and exclude "Don't Know / Not Relevant"

Table 5.6 Summary interpretation of innovation and change-related evidence

Theme	Overall judgement
Innovation within beneficiary firms	Positive evidence, especially for early-stage idea development, product / service / process development and operational improvement
Digital adoption and business improvement	Strong positive evidence from Digital for Business / Grow Digital beneficiaries
Investment readiness and expansion capacity	Positive evidence, especially for Feasibility and Business Expansion supports
Green / transition-related change	Positive evidence, particularly on environmental awareness, cost-saving opportunities and operational resilience, although these effects are not always captured well by conventional innovation metrics
Industry-level innovation effects	Limited and indirect evidence only

Source: Evaluation team assessment, drawing on survey, stakeholder and monitoring evidence.

5.4 Capability, skills and management development

A further important part of the LEO offer is its contribution to capability-building within beneficiary firms. In practice, the strongest evidence here relates to owner-manager and firm-level capability rather than to workforce training in a broader labour market sense. For many small businesses, this is less about formal accredited skills provision and more about strengthening the knowledge, judgement,

confidence and strategic capability of owners and managers, alongside improving access to networks, external support and practical business advice.

The evidence suggests that this is one of the clearer areas of positive contribution across the LEO supports. In particular, mentoring and training / networking / management development supports appear to generate strong reported gains in business knowledge, management capability, strategic direction, confidence and resilience, with these softer capability effects often acting as precursors to harder business outcomes.

As shown in Table 5.7, mentoring respondents reported particularly strong benefits in relation to decision-making, confidence, strategic direction, management capability and resilience. This suggests that mentoring is one of the clearest contributors to softer but important capability outcomes. Table 5.8 shows a similarly positive pattern for training, networking and management development, especially in relation to business knowledge and skills, management capability, knowledge of external support, networks and resilience.

These patterns are reinforced by the wider cross-cutting survey evidence. Across the LEO supports as a whole, beneficiaries most frequently reported improvements in business knowledge and skills, knowledge of external support available, business networks and contacts, operational capacity, management capability and resilience. While these are self-reported measures, they point to a model in which the LEO contribution often lies in helping firms become better informed, better connected and more capable of making and implementing business decisions.

Stakeholder evidence is broadly consistent with this interpretation. Feedback from the consultation process/stakeholder engagement described mentoring as one of the most valued elements of the LEO offer and highlighted the wider importance of local advice and relationship-based support for smaller firms. A senior local LEO stakeholder similarly described mentoring as a strong support and emphasised the value of the LEOs' hands-on, locally embedded role, while also warning that mentor panels are under strain and that current delivery pressures can push the system towards quantity rather than quality.

This is consistent with the Heads of Enterprise focus group, where mentoring was described as one of the most valuable supports because it develops softer business skills and provides practical one-to-one support at critical points in the business journey. As one participant put it, **"mentoring develops soft skills, but it can also save businesses from closing".**

There is also indicative evidence of added value. Capability and management supports are the types of intervention that many micro and small firms may be least likely to secure in a structured way without public support, particularly where they require trusted external input, time to step back from day-to-day pressures, or access to peer learning and networks. This is consistent with evidence from Chapter 3 showing that many beneficiaries would have found it difficult to access similar support elsewhere. The most balanced judgement is therefore that the LEO supports appear to generate clear added value in capability-building terms, particularly through mentoring and training-related supports, but that these gains are often enabling rather than immediately measurable in conventional outcome terms.

Overall, the evidence on capability, skills and management development is positive. Mentoring and training / networking / management development supports appear to contribute strongly to management capability, business knowledge, confidence, strategic direction and networks, with wider programme evidence suggesting that these are among the most common and important benefits reported by beneficiaries. The clearest conclusion is that the LEO supports add value not only through direct financial supports, but also through capability-building interventions that strengthen firms' ability to act, adapt and develop over time. The main caveat is that these gains are largely self-reported and are not well captured in routine monitoring, meaning that their significance is likely to be greater than the administrative evidence alone would suggest.

Table 5.7 Reported benefits from Mentoring Programme Support (% agreeing / strongly agreeing, excluding "Don't know / Not relevant")

Benefit	%
Improved quality of business decision-making	89.6%
Increased confidence in addressing business challenges	86.6%
Improved strategic direction	84.4%
Increased confidence in the use of external support	80.4%
Improved management capability	79.1%
Increased resilience to cope with internal and external changes	76.2%

Source: LEO beneficiary survey, Q3.17; analysis by evaluation team

Table 5.8 Reported benefits from Training, Networking and Management Development (% agreeing / strongly agreeing, excluding "Don't know / Not relevant")

Benefit	%
Improved business knowledge and skills	95.3%
Improved management capability	82.5%
Enhanced knowledge of external support available to the business	80.8%
Enhanced business networks and contacts	80.8%
Increased resilience to cope with internal and external changes	76.0%

Source: LEO beneficiary survey, Q3.19; analysis by evaluation team

5.5 Additionality and contribution

In line with the terms of reference, this section considers whether the outcomes reported by beneficiaries appear likely to be additional: that is, whether they would have been less likely to occur, would have happened more slowly, or would have been achieved less effectively in the absence of LEO support. The available evidence allows an indicative assessment, but not a definitive one. There is no experimental or quasi-experimental methodology available within the current evidence base, and the main direct evidence on additionality comes from self-reported survey data, supported by stakeholder views and the wider administrative context.

The survey provides two main types of direct evidence. First, the counterfactual questions suggest that, among businesses able to provide estimates, reported turnover and employment would often have been lower in the absence of support. As shown earlier in Table 5.4, the median actual turnover and employment figures are higher than the median counterfactual estimates. These differences are modest and should be interpreted cautiously, but they are consistent with positive contribution.

Second, responses on access to alternative provision suggest that similar support would often not have been easy to obtain elsewhere. As reported in Chapter 3, 59.5% of respondents said it would have been difficult or very difficult to access comparable support from another source, compared with 8.1% who said it would have been easy or very easy. This strengthens the case that at least some of the reported effects are additional, particularly for firms that relied on locally accessible, practical support rather than on mainstream commercial provision.

Heads of Enterprise focus group evidence supports this interpretation. Participants argued that LEO additionality is strongest for early-stage firms, rural businesses, artisan food, craft and design businesses, locally traded firms and other small enterprises that may not meet Enterprise Ireland criteria but nevertheless contribute to local employment and economic resilience.

At the same time, the survey also shows that many businesses were not operating in a support vacuum. As reported in Chapter 3, respondents also used other sources of advice and support, most commonly external advisers, Enterprise Ireland and Skillnet Ireland, while a substantial minority reported using none of the listed alternatives. This is important for interpretation. The existence of overlap with other support sources does not in itself imply low additionality. In many cases, LEO supports appear to function as an entry point, a complement to other provision, or a more accessible source of practical help for firms at an earlier stage of development. However, it does mean that strong claims about attribution would be unsafe.

Stakeholder evidence is broadly consistent with this interpretation. Feedback from the consultation process/stakeholder engagement described the LEOs as providing a valuable and needed service, particularly through local knowledge, accessibility, mentoring and support for smaller firms. The Heads of Enterprise focus group suggested that additionality is particularly high in more rural areas where local accessibility of support is particularly important for businesses. At the same time, this stakeholder also pointed to significant evidence limitations, including the absence of a CRM system and weaknesses in outcome tracking, which make it harder to demonstrate additionality robustly even where positive effects are real. This is an important caveat for the evaluation: the weakness of the formal evidence base should not be confused with absence of effect, but it does mean that additionality judgements need to remain proportionate and cautious.

Box 5.1 Note on estimating additional jobs

This box sets out the steps used to produce an indicative estimate of additional jobs created. The method is deliberately cautious and should be read as an estimate of likely scale rather than a precise count. In simple terms, the approach starts with the jobs reported by survey respondents, scales these up to reflect the wider group of supported businesses, and then applies an adjustment to reflect the fact that some activity may have happened anyway or may have displaced activity elsewhere.

Grossing up from survey to population

A full gross-up (i.e. *scaling survey responses to represent the wider population of supported businesses)* of the survey-based impact estimates to the total beneficiary population has not been undertaken because the available population data are not sufficiently robust for this purpose. While the evaluation team has access to broad activity measures by LEO and annual headline counts of LEO-supported client companies from the internal impact reports, these do not provide a fully deduplicated population of unique beneficiary businesses across the in-scope supports, nor a reliable breakdown by support type aligned to the survey sample.

The available activity figures were developed primarily for response target-setting rather than impact estimation, and using them as a proxy population produces implausibly large aggregate effects. In these circumstances, grossing up would risk overstating programme impacts. The survey-based estimates are therefore presented as applying to the matched respondent sample only, with wider client population figures used as contextual indicators of programme scale rather than as a basis for population-level impact estimation.

Illustrative adjustment of AES net new jobs using survey-based additionality evidence

As a limited sensitivity test, the survey-based employment additionality estimate was applied to the AES net new jobs figures to provide an indicative sense of how gross programme job change might translate into net additional effects. This should be treated with caution. The AES figures relate to the financially supported client LEO supports, while the survey-based factor is derived from a matched respondent sample using self-reported counterfactual employment and a proxy displacement adjustment. The two sources are therefore not perfectly aligned, and the exercise does not produce a robust net impact estimate. Rather, it provides a broad indication of scale.

Within the matched survey sample, total gross additional employment was estimated at **1,116.5 jobs** after cleaning and capping extreme values. Applying the displacement proxy *(an allowance for the possibility that some jobs created by supported businesses may have reduced activity or employment elsewhere)* reduced this to **306.8 net additional jobs (***the estimated number of jobs that are additional after allowing for factors such as deadweight and displacement)*, implying an additionality factor of **27.5%** relative to gross additional employment. Applying the optional market-conditions sensitivity adjustment reduced the estimate further to **272.2 jobs**, equivalent to an additionality factor of **24.4%**. If these factors are applied illustratively to the cumulative AES figure of **30,137 net new jobs** over the 2015–2025 period, this implies a broad indicative range of around **7,400 to 8,300 net additional jobs**. This should not be read as a definitive estimate of programme impact, but it does suggest that the AES headline job figures may overstate net additional employment if taken at face value, while still indicating a meaningful positive employment contribution.

Measure	Value
Gross additional employment in matched survey sample	1,116.5
Net additional employment after displacement	306.8
Net additional employment after displacement and market sensitivity	272.2
Implied additionality factor after displacement	27.5%
Implied additionality factor after displacement and market sensitivity	24.4%
Cumulative AES net new jobs, 2015–2025	30,137
Illustrative cumulative AES net additional jobs range	7,400–8,300

Source: Evaluation team analysis of LEO beneficiary survey and Enterprise Ireland AES data

Taking these strands together, the most balanced conclusion is that the LEO supports appear to generate meaningful but mainly indicative additionality. The evidence is strongest for supports that provide structured expert input, mentoring, diagnostic support or early-stage developmental assistance that firms may struggle to source elsewhere, particularly where they are small, locally focused or not yet ready for more specialist provision. The evidence is weaker where firms may also have had access to other advisory or funding routes, and the survey cannot by itself distinguish fully between deadweight, displacement or replacement effects. Accordingly, what can reasonably be said is that LEO support appears to have made a positive contribution to turnover, employment, capability and business development for many beneficiaries, and that these effects are likely to have been additional in at least some cases, but the current evidence base does not permit precise quantification of additionality across the LEO supports as a whole.

The illustrative case studies provide further qualitative support for the survey findings, while remaining subject to the same limitations around self-reported outcomes and attribution (Appendix 9). They show that LEO supports often operate as part of a pathway rather than as isolated interventions: businesses may combine advice, mentoring, training, digital, green and grant support at different points in their development. The cases also reinforce several cross-cutting findings from the wider evidence base: local accessibility matters; financial support can de-risk investment; advisory and mentoring support can strengthen confidence and decision-making; and digital and green supports can contribute to practical operational improvements. The case evidence should not be interpreted as representative or independently verified impact evidence, but it provides useful examples of the mechanisms through which LEO support may contribute to business growth, resilience and capability.

Table 5.9 What can and cannot be inferred on additionality

What can be inferred	What cannot be inferred robustly
Many beneficiaries report that turnover and employment would have been lower without support	The precise scale of net additional turnover or employment generated across the LEO supports
Similar support would often have been difficult to access elsewhere	That all reported effects are wholly attributable to LEO support alone
LEO support often appears to complement other sources of advice rather than duplicate them	The exact level of deadweight, displacement or substitution across schemes
Additionality is likely to be stronger for smaller firms needing practical, accessible support	Comparative additionality estimates across all in-scope supports with high confidence

Source: Evaluation team assessment, drawing on survey, stakeholder and monitoring evidence.

5.6 Sustainability of outcomes

The final issue for this chapter is whether the outcomes associated with LEO support appear likely to endure over time. Here, the evidence suggests a mixed but broadly positive picture. The most durable effects are likely to be those that involve embedded changes in business capability, management practice, operational systems or investment decisions, rather than one-off gains. This is important because much of the LEO offer is developmental in nature: mentoring, training, digital and green supports are intended not only to generate immediate benefits, but also to help firms build capabilities and changes that persist beyond the initial period of support.

At programme level, the survey suggests that a meaningful share of beneficiaries report outcomes that are themselves sustainability related. The overall wider-benefits question shows reported gains in business sustainability and resilience, alongside wider improvements in business knowledge, management capability and access to external support. These are not direct measures of long-term impact, but they are relevant indicators of whether firms feel better equipped to withstand shocks, adapt and continue developing over time.

There is also support-specific evidence pointing to durable benefits. As shown in Table 5.10, Green for Business / Energy Efficiency Grant respondents reported particularly strong effects on understanding energy and carbon impacts, identifying cost-saving opportunities, supporting investment in energy-efficient measures, improving environmental practices and reducing carbon footprint. These are consistent with changes that may continue to generate benefits over time, particularly where they involve installed measures, changed practices or improved management awareness. The Business Expansion Grant also shows strong reported effects on resilience and operational capacity; while mentoring and training / networking / management development both show reported resilience effects.

The survey provides some limited insight into persistence by timing of support. As shown in Table 5.11, reported gains in sustainability, resilience and management capability remain visible among both recent and longer-term users. These figures should be treated with caution, but they suggest that at least some reported benefits are not confined to the immediate period after support and may persist over time. Further, the fact that many businesses have availed of several LEO supports over time suggests that a relationship has been developed between the business and the LEO, which supports the longer-term sustainability of that business.

The evidence on lagged impacts is also important. Some supports, particularly Priming, Feasibility, Digital / Grow Digital and Green / Energy, are intended to shape future business development rather than only immediate performance. Survey responses are consistent with this. As shown in Table 5.12, a high share of respondents reported that the business supported through Priming Grant had gone ahead, and that the project supported through Feasibility Grant had proceeded. These are useful indicators of progression and suggest that some of the most important effects of early stage supports may emerge over time through later business development, rather than only in the short term.

The main caveat is that the evidence base remains limited for assessing long-term sustainability in a strict sense. Much of the available evidence is self-reported; the current monitoring system is not designed to track persistence or decay of benefits over time; and the evaluation window is shorter for newer supports such as Digital for Business, Green for Business, Energy Efficiency Grant and Grow Digital Voucher than for more established parts of the LEO supports. This means that sustainability can be assessed more confidently for mature, capability-building supports than for newer programmes whose effects may still be unfolding.

The Heads of Enterprise focus group also suggests that some LEO benefits are sustained through local ecosystem effects rather than only through individual firm outcomes. Participants pointed to examples such as enterprise workspaces, food hubs and regional business networks, facilitated or led by LEOs, which may help sustain business activity, peer learning and sector development in local areas. These effects are difficult to quantify, but they are relevant to understanding the longer-term local value of the LEO model.

Taking the evidence together, the most balanced judgement is that the LEO supports appear to support outcomes that are at least partly sustainable, especially where it builds management capability, operational capacity, resilience, environmental practices or investment readiness. Sustainability appears strongest where supports help firms embed new behaviours, systems or assets, and less certain where effects depend on external market conditions or where observation periods remain short. The evidence therefore supports a positive but qualified conclusion: LEO supports appear capable of generating enduring benefits for many firms, but the extent and persistence of those benefits cannot yet be measured consistently across the full programme.

Table 5.10 Support-specific indicators of potentially durable benefit (% agreeing / strongly agreeing, excluding "Don't know / Not relevant")

Support / benefit	%
Green / Energy – improved understanding of energy / carbon impacts	93.4%
Green / Energy – identified cost-saving opportunities	93.5%
Green / Energy – supported investment in energy-efficient measures	89.9%
Green / Energy – improved environmental practices	90.3%
Green / Energy – reduced carbon footprint	88.7%
Business Expansion – increased resilience	86.5%
Business Expansion – enabled increase in operational capacity	96.0%
Mentoring – increased resilience	76.2%
Training / networking / management development – increased resilience	76.0%

Source: LEO beneficiary survey, Q3.15, Q3.17, Q3.19 and Q3.21; analysis by evaluation team

Table 5.11 Sustainability-related benefits by timing of first support (% agreeing / strongly agreeing, excluding "Don't know / Not relevant")

Benefit	Recent support (≤2 years)	Longer term support (5+ years)
Enhanced the sustainability of the business	39.4%	37.0%
Increased resilience to cope with internal and external changes	42.9%	41.7%
Improved management capability	42.5%	45.5%

Source: LEO beneficiary survey, Q2.2 and Q3.23; analysis by evaluation team

Table 5.12 Early-stage progression indicators

Indicator	%
Priming-supported business went ahead	85.9%
Feasibility-supported project went ahead	85.5%

Source: LEO beneficiary survey, Q3.1 and Q3.6; analysis by evaluation team

5.7 Summary by in-scope support

The preceding sections have considered outcomes, impacts, additionality and sustainability across the LEO supports as a whole. This section provides a brief summary by in-scope support, drawing out the main differences in purpose, evidence and reported effects across the LEO supports. It is not intended to replicate the fuller programme-level assessment, which is provided in the appendices. Rather, it serves to illustrate the headline evaluative picture for each support and to indicate where findings are broadly consistent across the LEO supports and where there are material differences.

Overall, the evidence suggests that the in-scope supports contribute in different ways at different stages of the business journey. Early-stage supports appear strongest in relation to preparedness, testing and progression; growth-oriented supports show clearer links to productivity, turnover, profitability and employment; digital and green supports contribute to operational improvement, transition and resilience; and mentoring and training-related supports stand out for their contribution to capability, knowledge, confidence and strategic direction.

The programme-level appendices apply a common assessment framework across all in-scope supports and focus only on material differences in evidence, performance and implications. They provide more detailed profiles of each support, including scale and reach, key reported outcomes, indicative additionality, sustainability considerations and any support-specific lessons. This section should therefore be read as a high-level synthesis, with the appendices carrying the main programme-specific analysis.

Table 5.13 Summary of key findings by in-scope support

In scope support	Headline outcome picture	Additionality / sustainability summary
Start Your Own Business Programme	Strongest evidence on confidence, knowledge, preparedness and progression into business start-up	Additionality appears strongest for early-stage firms with limited alternative support; sustainability depends on whether early gains translate into later business survival and development
Priming Grant	Positive evidence on early business development, operational capacity and development of products, services or processes	Additionality appears likely where firms have limited access to finance or structured support; some effects are likely to be lagged and realised through later growth
Feasibility Grant	Strongest evidence on idea validation, feasibility assessment, demand testing and readiness for next-stage development	Additionality appears strongest in reducing uncertainty and supporting informed investment or development decisions; sustainability depends on whether projects proceed over time
Digital for Business / Grow Digital Voucher	Strong evidence on digital adoption, process efficiency, operational improvement and development of new products, services or processes	Additionality appears positive where firms would otherwise struggle to access structured digital support; sustainability is likely where new systems and practices become embedded
Green for Business / Energy Efficiency Grant	Positive evidence on environmental awareness, improved practices, cost-saving opportunities and resilience; weaker on conventional growth metrics	Additionality appears likely where firms would otherwise be less likely to prioritise green action; sustainability may be relatively strong where benefits arise from investments or embedded practice changes
Mentoring	Strong evidence on management capability, confidence, decision-making and strategic direction	Added value appears clear, particularly for smaller firms needing practical and trusted advice; sustainability is likely where learning influences continuing business decisions and behaviours
Training, Networking and Management Development	Strongest evidence on business knowledge, management capability, networks and resilience	Added value appears to lie mainly in softer and enabling effects; sustainability is likely where skills, contacts and management practices continue to be used beyond the period of support
Business Expansion Grant	Clearest evidence on productivity, turnover, profitability, operational capacity and employment effects	Additionality appears relatively strong where support enables businesses to invest or expand sooner or at greater scale; sustainability is likely where growth and capacity gains become embedded

Source: Evaluation team assessment, drawing on survey, stakeholder and monitoring evidence

5.8 Conclusion

Taken together, the evidence in this chapter supports a positive but qualified overall assessment of the LEO supports in relation to outcomes, impacts, additionality and sustainability. The strongest evidence is at business level, where beneficiaries report gains in productivity, sales, profitability, operational capacity, management capability, digital adoption, environmental practices and resilience. Across the

LEO supports, the Business Expansion Grant shows the clearest association with more immediate business growth effects, while Priming Grant and Feasibility Grant appear particularly important in supporting early-stage progression, validation and readiness for further investment. Digital and green supports are most clearly associated with operational and transition-related change, and mentoring and training / management development stand out for their contribution to business knowledge, confidence, strategic direction and wider capability-building.

In this sense, the in-scope LEO supports appear to deliver value both through harder business effects and through softer, enabling changes that support later development. This distinction is important: for many micro and small firms, improved capability, confidence, decision-making, digital systems or environmental practices may be the route through which later performance gains are achieved.

The evidence on additionality is positive but necessarily qualified. Survey responses, wider beneficiary feedback and stakeholder perspectives all suggest that many firms derived benefits that would have been less likely to occur, or would have occurred more slowly or less effectively, without LEO support. This appears especially plausible for smaller firms, early-stage businesses and firms requiring practical, locally accessible advice or structured expert input. However, the evidence base remains uneven. Much of it is self-reported, some outcomes are inherently difficult to attribute cleanly, and the monitoring system is better at capturing scale and participation than long-term outcomes or net effects.

Sustainability is similarly supported, but more clearly in relation to embedded capability, resilience, systems change and investment readiness than to all longer-term commercial outcomes. The most balanced overall judgement is therefore that the LEO supports appear to have generated meaningful benefits for a substantial share of beneficiaries, but that the strength of evidence varies across the LEO supports and is generally stronger for contribution than for precise attribution.

These findings are broadly consistent with wider policy objectives around entrepreneurship, business capability, digital transition, sustainability and strengthening locally traded sectors. At the same time, the chapter highlights recurring issues that shape effectiveness and impact, including variation across supports in the maturity of evidence, the importance of advisory and relationship-based delivery, and the limited strength of routine outcome monitoring. These themes provide an important basis for the following chapters, which consider delivery, governance and performance management, and then value for money.

6 Delivery, governance and performance management

Terms of reference coverage

This chapter mainly addresses the following evaluation objectives from the terms of reference:

- **Objective 3 – Efficiency:** assessing the efficiency of LEO supports, including delivery arrangements, administrative burden, resource use, delays and operational constraints.
- **Objective 4 – Coherence:** considering how governance, referral processes, delivery consistency and performance management arrangements support a coherent client journey across the 31 LEOs and wider enterprise support system.
- **Objective 7 – Lessons learned and recommendations:** identifying implications for future delivery, governance, data collection and performance management.

The chapter therefore examines how LEO supports are delivered and managed across the national network, including governance arrangements, delivery consistency, client journey and referral processes, performance monitoring and data systems. It focuses on the operational and management arrangements that shape efficient and coherent delivery, while value for money is considered separately in Chapter 7.

6.1 Introduction

The preceding chapters have considered the strategic rationale for the LEO model, the scale and composition of the in-scope LEO support, and the outcomes and impacts that supports appear to have generated for beneficiary businesses. This chapter turns to the question of how that programme is governed, managed and delivered in practice, and whether current arrangements remain effective, efficient and sustainable in light of the breadth of the support offer and the changing needs of small businesses. In doing so, it moves from asking *what* the LEO system is delivering to asking *how* it is delivered, and how far the current model supports or constrains performance.

The chapter focuses on the operational dimensions of the LEO model: governance and management structures, the balance between local responsiveness and network-wide consistency, ease of access for businesses, administrative burden, partnership arrangements, and the use of performance information to oversee and improve delivery. In line with the terms of reference, it also examines whether the model is supporting LEOs to deliver their objectives effectively, whether resources appear to be managed efficiently, and whether the model remains sustainable given the pace of change within industry and the increasing range of demands placed on the network. This provides an important bridge between the earlier analysis of LEO support scale and outcomes and the later assessment of value for money and future development options.

As in the previous chapter, the analysis draws on a mixed evidence base, including document review, administrative information, beneficiary survey findings and stakeholder perspectives. The strength of evidence varies across the issues considered. Survey and consultation evidence are particularly useful in understanding delivery quality, accessibility, consistency and beneficiary experience, while documentary and administrative sources are more informative on governance arrangements, targets and performance processes. The chapter therefore adopts a proportionate approach, distinguishing where possible between clearly evidenced operational issues, stakeholder-reported challenges and broader evaluative judgements about how well the LEO delivery model is functioning.

6.2 Management structures & delivery approach

6.2.1 Governance and delivery model

The LEO model is built around a deliberately hybrid set of governance and delivery arrangements. Services are delivered through the 31 Local Authorities on behalf of Enterprise Ireland, within a framework shaped by the **Service Level Agreement** (SLA), the **Operation and Performance Delivery**

Agreement (OPDA), and oversight by the LEO Steering Group. Enterprise Ireland's LEO Centre of Excellence provides management and policy support across the network, while local governance and delivery sit within broader Local Authority structures.

For context, the **SLA** is the agreement framework between Enterprise Ireland and each Local Authority / LEO. It sets out the operational rules, roles, service delivery arrangements, budget and reporting requirements under which Local Authorities deliver LEO services on behalf of Enterprise Ireland. The **OPDA** is the agreement between the Department and Enterprise Ireland. It provides the higher-level policy, performance and oversight framework for Enterprise Ireland's role in supporting and managing the LEO network. Together, these arrangements define the respective responsibilities of the Department, Enterprise Ireland, Local Authorities and LEOs within the hybrid national-local delivery model.

In principle, this gives the system both national coordination and local responsiveness. Central bodies provide strategic direction, funding, programme guidance and oversight, while local offices retain flexibility to respond to differing business needs, local economic conditions and enterprise profiles. This hybrid model is consistent with the policy rationale for LEOs as a locally accessible entry point for small businesses, and with the wider evidence in this evaluation that local proximity, visibility and responsiveness are central to the perceived value of the 31 LEOs.

On the evidence available, these arrangements appear broadly appropriate and functional. Stakeholder evidence is generally positive about the core model. Feedback from the consultation process/stakeholder engagement described the LEOs as a valuable and needed service, particularly because of their local knowledge, mentoring and support for smaller firms. The Heads of Enterprise focus group reinforced this, with participants emphasising that LEOs are embedded in local communities, close to clients, and able to work with businesses across the journey from pre-start through to growth.

6.2.2 Local flexibility and national consistency

The main delivery tension is not whether local flexibility is valuable, but how far it can be maintained while ensuring consistent standards, interpretation and client experience across the network. The evidence suggests that local discretion is an important strength of the LEO model. It allows offices to respond to different geographies, business densities, local sectors and local authority contexts. The Heads of Enterprise focus group was clear on this point: participants argued that "no two LEOs are the same" and that a one-size-fits-all model would be inappropriate, particularly where offices serve very different rural, urban or regional business bases.

At the same time, stakeholder evidence points to a risk of unwarranted inconsistency. Feedback from the consultation process/stakeholder engagement raised concerns about inconsistent interpretation of criteria, uneven decision-making and differences in what similar firms might receive in neighbouring areas. Other stakeholder evidence also pointed to differences in local delivery appetite, capacity and interpretation. Delivery partners consulted too highlighted differences between LEOs in approach and several stakeholders identified the challenges of responding to in-year changes in criteria for some supports, citing the need for more effective trialling and testing of new supports prior to launch. These issues matter because inconsistent processes can weaken the user journey, make performance harder to interpret, and create uncertainty for businesses.

The most balanced conclusion is therefore that the model requires consistency in standards, but not uniformity in local delivery. Local flexibility should be preserved where it reflects real differences in business need and local context. However, it needs to operate within clearer national standards, including common expectations on eligibility interpretation, documentation, referral processes, client tracking and minimum service standards. One practical suggestion from the Heads of Enterprise focus group was that a limited proportion of budget could be reserved for locally flexible deployment within national parameters, allowing LEOs to respond to specific local opportunities or needs without undermining national consistency.

6.2.3 Delivery constraints and annual planning

The evidence also points to several practical constraints that affect delivery efficiency. These are not primarily weaknesses in the local delivery model itself, but pressures created by the way funding, approval capacity and programme requirements are managed across the system.

Heads of Enterprise focus group participants identified annual budgeting and approval capacity as significant constraints. They noted that LEOs are expected to plan over a 12-month period, but that approval capacity can shift during the year, sometimes affecting the ability to respond to demand. Participants also highlighted that expenditure is not always aligned with approvals, because projects may be delayed by supply chain issues, skills shortages or the timing of business investment. This can make it difficult to convert approvals into spend within a single financial year.

These issues suggest that some delivery inefficiencies arise from annualised funding and approval processes rather than from local delivery behaviour alone. Short planning horizons can also affect staffing continuity, especially where temporary contracts depend on budget confirmation. The focus group evidence included examples of staff being released because the following year's budget had not been finalised in time, even where the need for capacity continued, and where considerable in-year investment in staff had been made by the LEO.

The implication is that delivery efficiency would be strengthened by longer planning horizons, earlier confirmation of budgets and approval capacity, and greater flexibility to manage timing differences between approval, project implementation and payment. This does not necessarily require full multi-annual budgets for all activity, but it does suggest a need for more predictable planning arrangements for core delivery capacity and higher-demand support areas.

6.2.4 Staffing capacity and administrative burden

A further constraint concerns staffing capacity and the administrative load placed on local offices. The current delivery model requires LEOs to manage client engagement, applications, claims, compliance, reporting, local authority requirements, Enterprise Ireland requirements and wider signposting. This is manageable where offices have sufficient capacity and stable teams, but the evidence suggests that some LEOs face avoidable churn and administrative strain.

The Heads of Enterprise focus group provided a specific example around administrative grading. Several participants noted that, where LEOs do not have Grade 5 administrative capacity, offices can lose trained Grade 4 staff to other Local Authority roles after investing time in training them on LEO systems and reporting requirements. This creates repeated onboarding costs, loss of tacit knowledge and reduced delivery efficiency.

Beneficiary evidence also points to administrative burden in the user journey. Although overall satisfaction with LEO support is high, ease of application for financial support is rated less strongly than other service dimensions in the beneficiary survey. Open-ended survey comments also refer to paperwork, repeated information requests, clarity of process and the burden of applying for relatively small amounts of funding. The evidence therefore suggests that administrative burden falls on both sides of the delivery relationship: on businesses seeking to access support, and on local teams managing applications, reporting and compliance.

The main improvement opportunity is to make processes more proportionate, particularly for lower-value or lower-risk supports, while maintaining appropriate accountability for public funds.

6.2.5 CRM, data systems and client journey management

The absence of a shared CRM or equivalent client-management infrastructure is one of the clearest recurring delivery constraints. It affects efficiency, consistency, referral quality and performance management. Stakeholders identified weak CRM infrastructure, fragmented systems and manual processes as barriers to effective referral, progression tracking and learning across the network.

The Heads of Enterprise focus group strongly supports this finding. Participants described reporting as burdensome and disproportionate, noting that LEOs report both to Local Authorities and Enterprise Ireland and have to work across multiple reporting systems. The long-promised CRM system was repeatedly identified as a key missing piece of delivery infrastructure, needed to reduce manual processes, improve client tracking and make reporting more proportionate.

This has implications beyond administrative convenience. Without stronger shared systems, it is difficult to track how clients move through the support journey, whether referrals to Enterprise Ireland or other agencies are completed successfully, whether businesses return for further support, or whether advisory interventions lead to later investment or outcomes. As the LEO offer broadens across start-up, capability-building, digitalisation, green transition, resilience and progression, the need for a shared view of the client journey becomes more important.

6.2.6 Overall assessment

Overall, the delivery and management model remains sound, but the systems around it need strengthening. The hybrid model gives the 31 LEOs a distinctive combination of national policy alignment and local accessibility. This remains a major strength, and there is no evidence that the locally embedded model should be replaced. However, the model is now carrying a wider and more complex set of expectations than in earlier periods, and this exposes weaknesses in consistency, planning, data infrastructure and administrative proportionality.

The key improvement need is therefore not wholesale redesign, but better support for the existing model. This should include clearer national standards, more proportionate application and compliance processes, more predictable planning and approval arrangements, stronger staffing continuity, and the long-delayed implementation of shared CRM or equivalent client-management infrastructure. These changes would help preserve local responsiveness while improving consistency, efficiency and the ability to evidence delivery quality and client progression across the network.

In short, the LEO model appears to work best where local discretion is supported by strong common systems. The priority should be to strengthen the common systems, not to reduce the local character that gives the model much of its value.

6.2.7 Beneficiary perspectives

Beneficiary survey evidence is strongly positive overall, particularly in relation to LEO staff professionalism, accessibility, responsiveness, clarity and relevance. As shown in Table 6.1, more than four-fifths of respondents rated each of these aspects as good or very good, with the strongest rating for professionalism and expertise of staff. The same evidence was introduced in Chapter 3 in relation to relevance and accessibility; it is revisited here as direct evidence of delivery quality.

Overall satisfaction is similarly strong. As shown in Table 6.2, 84.6% of respondents said they were satisfied or very satisfied with the support received, compared with 5.7% who were dissatisfied or very dissatisfied. Open-ended comments reinforce this positive picture, with beneficiaries frequently praising the helpfulness, professionalism and approachability of LEO staff.

The most qualified picture relates to ease of application for financial support, which received weaker ratings than other delivery dimensions. Although 71.9% of valid respondents rated the application process as good or very good, this was notably lower than ratings for staff professionalism, accessibility and responsiveness. Open-ended comments point to paperwork, repeated information requests, clarity of process and administrative burden as recurring issues. As summarised in Table 6.3, the most common suggested improvements were simpler application and claims processes, faster decisions and payments, clearer guidance, broader or more flexible support, and more follow-up.

Overall, the beneficiary evidence is positive on delivery quality and accessibility, but more qualified on administrative burden and ease of application. This supports the conclusion that the LEO model is valued by users, while also pointing to opportunities to improve efficiency, consistency and the user journey.

Table 6.1 Beneficiary ratings of service quality

Aspect of delivery	% good / very good
Professionalism and expertise of staff	91.4%
Accessibility of support	89.5%
Responsiveness to queries	88.7%
Clarity of information and guidance	86.5%
Relevance of advice and support	84.0%
Ease of application for financial support	71.9%

Source: LEO beneficiary survey, Q2.3; analysis by evaluation team. Percentages show "Good" or "Very Good" responses and exclude "Don't Know / Not Relevant".

Table 6.2 Overall satisfaction with LEO support

Overall satisfaction	% of respondents
Very satisfied / satisfied	84.6%
Neither satisfied nor dissatisfied	9.7%
Dissatisfied / very dissatisfied	5.7%

Source: LEO beneficiary survey, Q2.9; analysis by evaluation team. Percentages are based on valid responses, n=1,795.

Table 6.3 Most common suggested improvements from beneficiaries

Suggested improvement theme	Summary of comments
Simpler application and claims processes	Requests for less paperwork, clearer steps and reduced administrative burden
Faster decisions and payments	Requests for shorter approval times and quicker drawdown
Clearer guidance and communication	Requests for more straightforward information on eligibility, process and expectations
Broader or more flexible support	Requests for wider eligibility, larger grants or more tailored support
More follow-up and continuity	Requests for stronger aftercare, follow-up support and continuity of advice

Source: LEO beneficiary survey, Q2.8 open-text responses; analysis by evaluation team.

6.3 Progress towards targets, performance indicators and performance framework

The 31 LEOs operates within a formal performance and oversight framework, but the evidence suggests that this framework is stronger in monitoring activity and delivery volume than in tracking outputs, outcomes and support-specific performance in a robust evaluative sense. As shown in Table 6.4, the framework combines a number of different elements, including a headline jobs target, participant targets for mentoring and training, approval targets for selected newer supports, and wider administrative data on clients paid and AES measures.

In principle, this provides a structure for setting expectations, reviewing progress and responding to operational issues across the network. However, the framework has evolved over time and does not provide a fully consistent basis for assessing progress across the full evaluation period, particularly at the level of individual in-scope supports.

The Heads of Enterprise focus group strongly supports this assessment. Participants recognised the importance of the AES, but argued that it captures only a small part of LEO activity, particularly because mentoring, training and wider advisory work may well support job creation or retention without being reflected in AES measures. Heads also highlighted the risk that activity targets can push delivery towards volume rather than quality. As one participant put it, **"the emphasis is still really on numbers rather than quality".** Participants also noted that any move towards recording more meaningful engagement would require resourcing and staff time.

As Table 6.5 shows, formal targets exist mainly for a relatively narrow set of metrics. These include Training Participants, Mentoring Participants, and clients approved for Green for Business, Energy Efficiency Grant, Digital for Business and Grow Digital Voucher, with target-setting in these areas applying from 2018 onwards. The framework also includes a jobs target, which initially took the form of a collective target of 3,000 net new jobs, before increasing to 3,500 in 2022 and being allocated across individual LEOs. This evolution is summarised in Table 6.7.

The latest-year picture, shown in Table 6.6, suggests a generally strong pattern of delivery against target in 2025, particularly across the main advisory, training, green and digital activity measures. The network exceeded the target for training participants, reaching **44,209 against a target of 35,000**; mentoring participants, reaching **16,628 against 11,500**; Green for Business approvals, reaching **1,094 against 601**; Energy Efficiency Grant approvals, reaching **641 against 601**; and Digital for Business approvals, reaching **1,134 against 500**. This indicates that the LEO system continued to deliver at scale in 2025 and, across most target-bearing activity measures, substantially outperformed formal throughput expectations.

At the same time, performance remained more mixed where the measures relate either to employment outcomes or newer forms of support. Net new jobs reached **2,479 against a target of 3,500**, equivalent to **71% of target**, indicating continued positive employment growth but below the level anticipated in the annual target. Grow Digital Voucher approvals reached **318 against a target of 500**, equivalent to **64% of target**, suggesting that uptake had not yet reached the expected level in 2025. Overall, the 2025 picture suggests that the performance framework is useful as a management tool for monitoring delivery and uptake. It also shows that delivery performance is strongest across established advisory and training supports, and in some green and digital schemes, while job creation and uptake of newer voucher-based support remain more challenging and may be more exposed to external business conditions, scheme maturity and client readiness.

The main limitation of the framework is that many of the core measures are closer to output or uptake counts rather than measures of quality, progression or outcomes. Training participants, mentoring participants and clients approved are all useful indicators of delivery scale, but they do not by themselves show whether the intended changes for businesses were realised. For several of the long-established grant schemes, including Priming Grant, Feasibility Grant and Business Expansion Grant, the main administrative evidence is the number of clients paid and the value of payments by year and by LEO, rather than a routinely tracked output measure with associated targets. Start Your Own Business is weaker still from a monitoring perspective, as there is no routinely recorded LEO-level output focused on it in isolation.

There are also limitations in the quality and interpretability of some of the measures themselves. Training participation is not based on unique businesses, so repeat engagement can inflate apparent reach; mentoring participants reflect businesses receiving a block of mentoring rather than intensity of support; and approval measures for newer schemes are unique only within each year, meaning that repeat support over time is not fully visible in headline counts. More generally, the absence of a shared CRM system and the fragmentation of some referral and information processes limit the ability of the system to track client journeys, transitions between supports and progression through the wider enterprise support landscape.

Within these constraints, the available monitoring evidence indicates that the network has delivered activity at substantial scale and, in several areas, outperformed formal delivery targets. The 2025

results show particularly strong performance on training, mentoring, Green for Business and Digital for Business, all of which exceeded target by a material margin. This suggests that the framework is effective in signalling whether agreed delivery volumes are being achieved and in highlighting areas of stronger or weaker operational performance. However, because the framework is more focused on throughput than on results, these data should be interpreted as evidence of delivery progress rather than of effectiveness in a fuller sense.

The performance framework therefore supports oversight of what is being delivered, but is less effective in showing what difference delivery is making. It is useful for operational management, but less well suited to understanding whether activities are translating into intended results, whether variation across offices reflects differences in need or differences in practice, and whether performance information is being used systematically to drive improvement in consistency, accessibility or client progression.

There is therefore a case for strengthening the performance framework rather than replacing it. The evidence suggests three main areas for improvement. First, support-specific measures should be developed further so that long-established grant schemes and non-financial supports can be monitored on a more comparable basis. Second, monitoring should move progressively from simple activity counts towards a more balanced mix of reach, progression, output and outcome indicators, with clearer links to the intended logic of each support. Third, stronger shared systems, including better client tracking and referral information, would improve the ability of the network to collect, analyse, disseminate and respond to performance information in a consistent way.

Finally, some areas of the terms of reference are only weakly addressed by the current performance framework. In particular, there is little routine evidence on equality dimensions such as ethnicity within the core monitoring system, and any fuller judgement on such issues is considered separately in Chapter 7, where broader questions of equity and targeting are addressed. More generally, the current framework should be understood as a practical management system rather than a complete evaluative tool. It is capable of supporting operational oversight and delivery monitoring, but its limitations in relation to outputs, outcomes and client journeys mean that it cannot on its own provide a strong basis for judging overall effectiveness.

Overall, the evidence for this section is mixed. The 31 LEOs have a clear and established framework for target-setting and performance oversight, and the 2025 data show that it is capable of exceeding targets in several important delivery areas. However, the system remains limited in its ability to measure support-specific results, compare performance consistently across the LEO supports, or demonstrate clearly how monitoring information is used to improve delivery. The implication is that the framework is adequate for operational management but underdeveloped for evaluative performance management, and that strengthening it would improve both delivery oversight and the longer-term sustainability of the LEO model.

Table 6.4 Overview of the LEO performance framework

Element of framework	Coverage	Main purpose	Main limitation
Net new jobs target	Network-wide initially; by LEO from 2022	Headline programme performance measure	Programme-level only; not scheme-specific and not attributable to individual supports
Training participants targets	By LEO from 2018	Monitors delivery volume	Not unique businesses; activity metric rather than output or outcome
Mentoring participants targets	By LEO from 2018	Monitors delivery volume	Measures supported participants rather than outcomes achieved
Clients approved targets for Green for Business, Energy Efficiency Grant, Digital for Business and Grow Digital Voucher	By LEO from 2018	Monitors uptake / delivery of newer schemes	Approval measures are closer to uptake than to output or outcome
Clients paid data for grant schemes	Available by year and LEO	Administrative tracking of delivery	No associated targets for key grant schemes such as Priming, Feasibility and Business Expansion
AES measures (clients, total jobs, gross gains/losses, net jobs)	Network-wide and by LEO	Tracks supported programme scale and employment trends	Useful context, but not support-specific and not a direct measure of effectiveness

Source: Enterprise Ireland monitoring material; analysis by evaluation team. As noted earlier "participants" refers to recorded participation in training or mentoring activity and may include repeat engagement by the same business. "Clients approved" refers to businesses approved for a support in a given year, but does not necessarily show completion or implementation. "Clients paid" refers to businesses receiving payment and is mainly used for grant schemes; it is an administrative payment measure rather than a direct outcome measure. "Unique businesses" is used only where the data identify distinct businesses, such as the number of businesses captured in the Annual Employment Survey.

Table 6.5 Target-bearing metrics in the current framework

Metric	Target exists?	Target starts	Level	Comment
Net new jobs	Yes	Pre-2022	Network-wide initially; by LEO from 2022	Headline programme Key Performance Indicator (KPI)
Training participants	Yes	2018	By LEO	Activity / participation metric
Mentoring participants	Yes	2018	By LEO	Activity / participation metric
Clients approved – Green for Business	Yes	2018	By LEO	Uptake / approval metric
Clients approved – Energy Efficiency Grant	Yes	2018	By LEO	Uptake / approval metric
Clients approved – Digital for Business	Yes	2018	By LEO	Uptake / approval metric
Clients approved – Grow Digital Voucher	Yes	2018*	By LEO	Uptake / approval metric; support launched late in the period
Clients paid – Priming Grant	No	n/a	n/a	Administrative measure only
Clients paid – Feasibility Grant	No	n/a	n/a	Administrative measure only
Clients paid – Business Expansion Grant	No	n/a	n/a	Administrative measure only
Start Your Own Business-specific LEO output	No routine target evidenced	n/a	n/a	Only partial national-level activity reporting

** The framework covers this metric from the point at which the scheme entered the monitored programme; the support itself was only introduced later.*
Source: Enterprise Ireland monitoring material; analysis by evaluation team.

Table 6.6 Latest year achieved versus target (2025)

Metric	2025 Target	2025 Actual	Actual as % Target
Net new jobs	3,500	2,479	71%
Training participants	35,000	44,209	126%
Mentoring participants	11,500	16,628	145%
Clients approved – Green for Business	601	1,094	182%
Clients approved – Energy Efficiency Grant	601	641	107%
Clients approved – Digital for Business	500	1,134	227%
Clients approved – Grow Digital Voucher	500	318	64%

Source: Enterprise Ireland monitoring material; analysis by evaluation team.

Table 6.7 Evolution of the jobs target framework

Period	Jobs target arrangement	Commentary
Early years of LEO operation	Collective target of 3,000 net new jobs	Provided a single headline performance benchmark for the network
From 2022	Collective target increased to 3,500 net new jobs	Reflected a revised and more ambitious headline target
From 2022 onwards	Jobs target allocated across individual LEOs	Increased local accountability, but remained a programme-level rather than support-specific measure

Source: Enterprise Ireland monitoring material; analysis by evaluation team.

DETE and Enterprise Ireland should strengthen the current LEO performance framework by moving from a predominantly activity-based model towards a more balanced set of measures covering delivery, outputs, outcomes and progression. A full redesign of the Key Performance Indicator (KPI) system should be taken forward as a separate implementation exercise, but the direction of travel can be set now. At minimum, the future framework should include a small common set of core delivery measures for all supports, a limited number of support-specific output indicators aligned to the intended logic of each scheme, selected cross-cutting outcome measures for beneficiary businesses, and periodic checks on additionality, equity and progression through the wider support ecosystem. The aim should be to retain a practical management system, while improving its usefulness for learning, consistency and evaluation.

Table 6.8 Illustrative structure for a future LEO performance framework

Level	Purpose	Illustrative measures
Core delivery measures	Track delivery volume, timeliness and operational efficiency across all supports	Unique businesses supported; approvals; payments; value of support; application-to-decision time; approval-to-payment time; completion/drop-out rates
Support-specific output measures	Track whether each support is delivering its immediate intended outputs	SYOB participants completing programme and businesses started; feasibility projects proceeding; digital action plans completed; energy/green measures implemented; mentoring plans completed; business expansion projects completed
Cross-cutting outcome measures	Track common business-level changes across the programme, recognising that not all measures apply equally to all supports	Turnover change; employment change; productivity proxy; management capability; digital adoption; environmental improvement; resilience; progression to other supports
Additionality and equity checks	Provide periodic evidence on whether support is reaching the right firms and adding value beyond what would otherwise occur	Difficulty accessing similar support elsewhere; reported acceleration or strengthening of change; reach by business stage, sector and geography; referral/progression rates; participation by under-represented groups where feasible

Source: Evaluation team assessment

6.4 Conclusion

Overall, the evidence suggests that the LEO delivery model is broadly effective and well regarded, but that its continued performance depends on strengthening the systems and processes that sit around local delivery. The core model remains sound: a national framework delivered through locally embedded offices gives the 31 LEOs visibility, accessibility and responsiveness, while allowing support

to be tailored to different local enterprise contexts. Beneficiary survey evidence is strongly positive, with high ratings for professionalism, accessibility, responsiveness, clarity and relevance, and high overall satisfaction with the support received.

At the same time, the chapter identifies several operational issues that limit consistency, efficiency and performance management across the network. Stakeholder evidence points to variation in interpretation, delivery practice, staffing capacity and local delivery appetite. Beneficiary feedback also indicates that application, claims and compliance processes can feel burdensome, particularly for smaller firms and lower value supports. These issues do not undermine the case for the locally delivered model, but they do suggest that some aspects of the user journey remain more complex and less consistent than they need to be.

The governance and management framework provides a reasonable basis for national oversight, with established structures including Enterprise Ireland's LEO Centre of Excellence, the LEO Steering Group, service agreements, performance reviews and target-setting processes. However, the framework is stronger as an output and delivery-volume monitoring system than as a rounded performance management framework. Current indicators capture participation, approvals, payments and headline jobs measures, but they are weaker on support quality, completion, client progression, outcomes, referral quality and consistency of delivery. As a result, the system can show that substantial activity is being delivered, but is less able to demonstrate clearly how that activity translates into results or how consistently clients move through the wider support pathway.

The absence of a shared CRM or equivalent client-management infrastructure is a recurring constraint. It limits visibility of the client journey, weakens referral and progression tracking, creates manual processes, and reduces the ability of the network to learn systematically from client data. This is especially important given the widening role of LEOs across start-up, capability-building, digitalisation, green transition, resilience and progression to other enterprise supports. As the support offer becomes broader, stronger shared systems become more important to maintaining coherence and efficient delivery.

The chapter therefore supports a positive but qualified judgement on delivery, governance and performance management. The LEO model is delivering valued support at scale, and the local office structure remains central to its accessibility and relevance. However, the model now requires stronger national standards, more consistent processes, better data infrastructure and a more outcome-oriented performance framework. The priority is not to reduce local responsiveness, but to support it with clearer common standards, streamlined administration, better referral mechanisms and improved performance evidence.

Future improvement should therefore focus on simplifying and standardising the user journey where appropriate; strengthening referral and progression pathways between LEOs, Enterprise Ireland, the National Enterprise Hub and other supports; improving client tracking and CRM infrastructure; and moving the performance framework beyond activity counts towards a balanced set of delivery, output, outcome and progression measures. These changes would help preserve the distinctive strengths of the LEO model while making delivery more consistent, efficient and easier to evidence across the national network.

7 Value for money

Terms of reference coverage

This chapter mainly addresses the following evaluation objectives from the terms of reference:

- **Objective 3 – Efficiency:** assessing the efficiency and value for money of LEO supports, including available evidence on costs, resource use, delivery efficiency and any gaps or inefficiencies.
- **Objective 6 – Impacts and additionality:** considering the relationship between expenditure, activity, reported outcomes, additionality and wider benefits for supported businesses.
- **Objective 7 – Lessons learned and recommendations:** identifying implications for future value for money assessment, monitoring, data collection and programme management.

The chapter therefore assesses value for money across the in-scope LEO supports, drawing on available evidence on expenditure, management costs, cost drivers, outputs, outcomes, additionality, equity and leverage. It also identifies the main evidence limitations that affect the strength of conclusions that can be drawn.

7.1 Introduction

This chapter assesses the value for money of the LEO supports, drawing together evidence on expenditure, delivery, activity, beneficiary outcomes, additionality, leverage, equity and wider qualitative value. It builds on the earlier chapters: Chapter 4 provided the baseline evidence on scale, expenditure and activity; Chapter 5 assessed outcomes, impacts, additionality and sustainability; and Chapter 6 considered delivery, governance and performance management.

The assessment is structured around the 4Es: economy, efficiency, effectiveness and equity. Economy considers whether resources are being obtained and used at reasonable cost, including what can be said about management and delivery costs. Efficiency considers how far inputs are converted into activity, outputs and associated business investment. Effectiveness considers the relationship between expenditure and the outcomes and impacts achieved. Equity considers whether resources and benefits are distributed fairly across relevant firms and places.

The analysis is necessarily proportionate. The available evidence does not support a full cost-benefit analysis or a precise estimate of net economic impact. Management-cost data, budget-utilisation data, support-specific output/outcome data and robust counterfactual impact evidence are all limited. The chapter therefore provides a structured value for money judgement based on the strength, consistency and limitations of the available evidence, rather than a mechanistic benefit-cost calculation.

7.2 Economy

This section considers whether the LEO supports have been delivered economically, including what can be said about management and delivery costs, the main cost drivers affecting the network, and the scope for cost-saving or process-efficiency measures without weakening the local accessibility and quality of support.

7.2.1 Management spend

Enterprise Ireland monitoring data provide a useful indication of LEO management spend across the wider LEO system. For the purposes of this analysis, management spend is defined as **LEO pay expenditure only**. These figures relate to both in-scope and out-of-scope LEO activity and should therefore be interpreted as system-level management and delivery costs rather than costs attributable only to the supports covered by this evaluation.

Table 7.1 shows that LEO pay increased from €6.7 million in 2015 to €9.7 million in 2025. This represents moderate growth compared with the movement in total LEO expenditure, which increased

from €31.6 million to €64.4 million over the same period and peaked at €99.9 million in 2020 due to exceptional Covid-related expenditure. LEO pay as a share of total spend therefore fluctuated considerably, from around 20–23% in the earlier years to 8.9% in 2020, before rising again to 17.2% in 2024. LEO pay as a share of total spend averages at 18.72% over the 11 years from 2015 to 2025.

This pattern suggests that the LEO model has a relatively fixed staffing and core delivery cost base, while total expenditure varies more sharply in response to programme budgets, claims, demand-led activity and exceptional support measures. For the economy assessment, the key implication is that pay-cost ratios should be interpreted cautiously: they can change substantially from year to year because of movements in total programme expenditure, even where underlying staffing and delivery capacity remain broadly stable.

Table 7.1 LEO pay and total expenditure, 2015–2025

Year	LEO pay	Total LEO spend	LEO pay as % of total spend
2015	€6,702,161	€31,589,336	21.2%
2016	€6,217,132	€30,717,622	20.2%
2017	€7,814,214	€34,533,429	22.6%
2018	€8,031,101	€35,243,139	22.8%
2019	€7,938,558	€37,964,673	20.9%
2020	€8,938,364	€99,916,377	8.9%
2021	€10,740,111	€58,099,546	18.5%
2022	€9,340,086	€38,974,261	24.0%
2023	€9,499,203	€65,318,040	14.5%
2024	€9,615,088	€56,047,836	17.2%
2025	€9,712,997	€64,433,678	15.1%

Source: Enterprise Ireland monitoring data; analysis by evaluation team.

Note: LEO pay includes 3553-LEO - PAY, 5004-SALARIES & WAGES, 5011-HOLIDAY PAY ACCRUAL, 5005-EMPLOYERS Pay Related Social Insurance (PRSI), 5006-AGENCY STAFF and 5007-OVERTIME. Figures relate to total LEO activity, including both in-scope and out-of-scope supports.

7.2.2 Cost drivers and cost saving measures

The available data provide a partial measure of management spend, using LEO pay expenditure as a proxy for the staffing and core delivery cost base of the LEO system. This does not provide a full support-by-support management-cost dataset, and it relates to total LEO activity rather than only to the in-scope supports. However, it does provide useful context for the economy assessment. As shown above, LEO pay costs have been relatively stable compared with total LEO expenditure, suggesting that the LEO model has a relatively fixed staffing and core delivery cost base, while total programme expenditure varies more significantly with demand, approvals, claims and exceptional support activity.

This means that the economy assessment should not rely only on pay as a percentage of total spend, since this ratio can move substantially from year to year as total expenditure changes. Instead, the more relevant question is whether the staffing and delivery infrastructure is being supported by efficient systems and proportionate processes. Stakeholder evidence, focus group evidence and the delivery analysis in Chapter 6 point to several avoidable or partly avoidable cost drivers within the current model. These include fragmented systems, manual reporting, inconsistent interpretation of eligibility and processes, variable local practice, administrative burden in application and claims processes, staffing churn, and the absence of a shared CRM or equivalent client-management infrastructure.

Heads of Enterprise focus group evidence supports this interpretation. Participants identified annualised budgets, shifting approval capacity, staff turnover, multiple reporting systems and delays in CRM implementation as practical cost drivers. These factors are likely to increase staff time, duplicate administrative effort and reduce the ability of offices to plan delivery efficiently across the year.

Importantly, these economy issues do not point to the local footprint of the 31 LEOs as the main source of inefficiency. The local office structure is central to the model's value, particularly because it provides visibility, accessibility, trust and local knowledge. The more relevant economy question is whether this local delivery model is supported by sufficiently efficient shared systems, consistent guidance and proportionate processes. On the evidence available, the answer is mixed: the model appears to generate value because it is locally embedded, but some of the systems around it create avoidable administrative cost.

The main opportunities for improving economy therefore lie in reducing avoidable process costs rather than reducing the local character of the model. This includes implementing a shared CRM, simplifying application and claims processes where proportionate, standardising interpretation where appropriate, reducing duplication between Local Authority and Enterprise Ireland reporting, improving referral tracking, and giving offices more predictable budget and approval planning arrangements.

Table 7.2 Cost-saving opportunities

Area	Current issue	Potential economy benefit
CRM / client management	Manual processes, fragmented client records and weak tracking of referrals and progression	Reduced duplication of staff effort; better client journey visibility; more efficient reporting
Application and claims processes	Paperwork and compliance burden can be high, particularly for smaller firms and lower value supports	Lower administrative burden for firms and LEO staff; improved user experience
Reporting systems	LEOs report to both Local Authorities and Enterprise Ireland, often through multiple systems	Reduced duplication; clearer management information
Eligibility interpretation	Stakeholder evidence points to variation in interpretation across LEOs	More consistent decision-making; fewer avoidable queries and rework
Budget and approval planning	Annualised budgets and shifting approval capacity create planning inefficiencies	Better scheduling, staffing continuity and demand management
Referral pathways	Weak tracking of handovers to Enterprise Ireland, National Enterprise Hub and other provision	Reduced duplication; better use of wider support infrastructure

Source: Evaluation team assessment, drawing on stakeholder, focus group and documentary evidence

Overall, the economy evidence is therefore more complete than previously, but still qualified. LEO pay data provide a useful proxy for the staffing and core delivery cost base, but they do not allow management-cost efficiency to be assessed by individual support. The key economy conclusion is that future cost-effectiveness is most likely to be improved through better shared infrastructure, simpler processes and clearer delivery standards, rather than through reducing the local presence that underpins the LEO model's value.

7.3 Efficiency

This section considers how well LEO inputs have been converted into activities and outputs, including the relationship between expenditure, delivery volumes, budget execution, business co-investment and the administrative processes through which support is provided.

7.3.1 Budget execution

Budget execution is not assessed as a standalone value for money measure in this evaluation because the LEO funding model is flexible and demand responsive. The budget figures available for in-scope supports represent February baseline allocations, which are typically amended during the year in response to demand, approvals, drawdown patterns and wider budget management processes. As a result, comparing actual expenditure with the initial February allocation would not provide a robust measure of budget utilisation or delivery efficiency. The relevant value for money question is therefore not whether expenditure matched the initial baseline allocation, but whether the resources ultimately deployed were converted into appropriate activity, outputs and business benefits. This is considered through the analysis of expenditure, outputs, reported outcomes and cost-per-output evidence in the sections that follow.

7.3.2 Cost per output measure

For the purposes of this evaluation, outputs are understood as the direct units of activity delivered through LEO supports, such as participants trained, clients mentored, grants paid or clients approved. Outcomes are the subsequent changes for businesses, such as improved productivity, sales, profitability, management capability, digital adoption or resilience. On this basis, the available expenditure and activity data allow some indicative assessment of cost per output, although not a full assessment of cost per outcome.

The clearest unit-cost estimates can be produced where support-specific expenditure can be matched to a support-specific delivery measure. For 2025, this is possible for the main in-scope supports using available expenditure and activity data. These figures should be treated as indicative, because the output units differ substantially across supports. A training participant is not equivalent to a mentored business, a grant recipient, or a business approved for a digital or green support. Some measures also count participations rather than unique businesses, and grant-based measures reflect payments or approvals rather than the scale or quality of the project delivered.

Table 7.3 Indicative cost per output, selected in-scope supports, 2025

Support	2025 expenditure	Output measure	2025 output volume	Indicative cost per output
Start Your Own Business	€0.9m	Participants	5,684	€174 per participant
Mentoring	€3.2m	Mentoring participants / clients	16,628	€192 per participant
Training, Networking and Management Development	€6.9m	Training participants	44,209	€156 per participant
Priming Grant	€4.5m	Clients paid	263	€17,159 per client paid
Feasibility Grant	€1.9m	Clients paid	211	€8,915 per client paid
Business Expansion Grant	€9.4m	Clients paid	488	€19,277 per client paid
Green for Business	€2.3m	Clients approved	1,094	€2,062 per client approved
Energy Efficiency Grant	€5.2m	Clients approved	641	€8,060 per client approved
Digital for Business	€2.2m	Clients approved	1,134	€1,948 per client approved

Source: Evaluation team analysis of Enterprise Ireland monitoring data.

Note: Figures are indicative and rounded. Output measures are not directly comparable across supports. Training and mentoring figures are participant-based and may not represent unique businesses. Grant figures use clients paid where available. Green, Energy Efficiency and Digital figures use approval data, which measure uptake rather than completed implementation. The figures exclude wider LEO management costs unless already included in support-specific expenditure. As noted earlier, "participants" refers to recorded participation in training or mentoring activity and may include repeat engagement by the same business. "Clients approved" refers to businesses approved for a support in a given year, but does not necessarily show completion or implementation. "Clients paid" refers to businesses receiving payment and is mainly used for grant schemes; it is an administrative payment measure rather than a direct outcome measure.

The 2025 data show a clear distinction between high-volume advisory or training supports and direct grant-based supports. Start Your Own Business and mentoring had the lowest indicative costs per output, at **€174** and **€192 per participant** respectively, reflecting their relatively light-touch, advisory or group-based delivery models. Training, Networking and Management Development also remained relatively low-cost compared with grant supports, at **€156 per participant**, despite representing a larger area of overall expenditure and a very high volume of participants.

The green and digital supports occupy a middle position, although there is variation within this group. Digital for Business and Green for Business show relatively modest indicative costs per approved client, at **€1,948** and **€2,062** respectively, consistent with their diagnostic, advisory or smaller-scale intervention models. The Energy Efficiency Grant is higher, at **€8,060 per approved client**, reflecting its more direct financial support element, and is closer to the lower end of the grant-based schemes. The main financial grants continue to show the highest costs per output: **€17,159 per client paid** for Priming Grant and **€19,277 per client paid** for Business Expansion Grant, while Feasibility Grant is lower at **€8,915 per client paid**. This is expected, as the output in these cases is a grant-supported business or project rather than a training, mentoring or advisory interaction. Overall, the table reinforces the need to interpret cost per output in light of the purpose, intensity and expected outcomes of each support, rather than treating all outputs as equivalent.

These figures should not be interpreted as showing that one support is necessarily more efficient than another. The supports have different purposes, intensity and expected effects. A higher cost per output may be appropriate where the support involves direct financial assistance for investment, start-up, feasibility testing or expansion. Conversely, a low cost per participant does not by itself demonstrate greater value if the support is lighter-touch or if outcomes are not tracked. The figures are therefore most useful as a descriptive efficiency indicator: they show the approximate public cost of delivering one unit of activity, but not the value or outcome generated by that unit.

Overall, the available cost-per-output evidence suggests that the LEO supports combine low-cost, high-volume advisory and training outputs with higher-cost grant-based outputs. This is consistent with the design of the model as a mixed programme of light-touch, capability-building and financial supports. However, the current monitoring system does not allow a comparable cost-per-outcome assessment across supports. Strengthening future monitoring would require clearer output definitions, consistent recording of unique businesses supported, and better linkage between outputs and subsequent business outcomes.

7.3.3 Leverage and business contribution

A further dimension of efficiency is the extent to which public expenditure is associated with business co-investment. Several in-scope grant supports require a business contribution, commonly through a 50% intervention rate. This means that public grant expenditure is associated with additional business expenditure on supported projects. This is relevant to efficiency because it shows that LEO grant funding is not the only resource being deployed: firms also commit their own funds.

However, this should be interpreted carefully. The estimate below should be understood as **gross associated business contribution**, not proven additional private finance mobilised. Some business expenditure may have happened anyway, and the available data do not provide a counterfactual. The figures therefore indicate the scale of business co-funding associated with selected supports, rather than a definitive estimate of additional private sector finance leveraged.

The estimate is also design-based rather than directly observed. It has been derived by applying the relevant grant intervention rates to public grant expenditure. In most cases, the estimate assumes that grants were paid at or close to the maximum permitted intervention rate. Where grants were paid below the maximum permitted intervention rate, actual business contributions would be higher. Where regional variation applies, particularly for Feasibility Grant, the exact contribution depends on the geographic distribution of supported projects.

Table 7.4 Caveats on estimating leverage

Issue	Implication
Grant intervention rates indicate required business contribution	They allow indicative estimation of gross business co-funding associated with supported projects.
Monitoring data do not consistently report private contribution as a separate field	Estimates must be derived from public grant expenditure and intervention rates.
Business contribution is not the same as additional private finance mobilised	Some expenditure may have happened anyway without LEO support.
Advisory supports may stimulate later investment	This is not consistently captured in current monitoring data.
Supports differ in intervention rate and eligible cost structure	Programme-level estimates should be interpreted cautiously.
Grants may be paid below the maximum permitted intervention rate	Actual business contribution may be higher than the design-based estimate.

Source: Evaluation team assessment, drawing on grant rules, monitoring limitations and programme documentation

Applying grant award rules to the 2015–2025 expenditure series suggests that approximately **€151.4m** of public grant expenditure on Priming Grant, Business Expansion Grant, Feasibility Grant and Energy Efficiency Grant was associated with an estimated **€142.6m–€147.3m** of gross business contribution. This implies a total supported project value of approximately **€294m–€299m** across these selected grant supports. In 2025, approximately **€21.0m** of public grant expenditure was associated with an estimated **€16.9m–€17.5m** of gross business contribution, implying a total supported project value of approximately **€37.9m–€38.5m**.

Table 7.5 Indicative estimate of gross business contribution associated with selected in-scope grant supports, 2015–2025 and 2025

Support	Public grant expenditure, 2015 2025	Estimated gross business contribution, 2015 2025	Public grant expenditure, 2025	Estimated gross business contribution, 2025
Expansion Grant	€78.5m	c. €78.5m	€9.4m	c. €9.4m
Priming Grant	€52.8m	c. €52.8m	€4.5m	c. €4.5m
Feasibility Grant	€14.0m	c. €9.3m–€14.0m	€1.9m	c. €1.3m–€1.9m
Energy Efficiency Grant	€6.1m	c. €2.0m	€5.2m	c. €1.7m
Total	**€151.4m**	**c. €142.6m–€147.3m**	**€21.0m**	**c. €16.9m–€17.5m**
Implied total supported project value	—	**c. €294m–€299m**	—	**c. €37.9m–€38.5m**

Source: Estimated by the evaluation team using Enterprise Ireland monitoring data reported in Chapter 4 and grant intervention rates set out in the LEO Evaluation and Approvals Committee (EVAC) Handbook and White Paper on Enterprise Implementation Plan Update Report H2 2024

Note: Estimates are indicative and design based. They are derived from public grant expenditure and applicable intervention rates and should be interpreted as gross associated business contribution, not proven additional private finance mobilised. Where grants were paid below the maximum permitted intervention rate, actual business contributions would be higher.

The estimate suggests that the selected in-scope grant supports were associated with a material scale of business co-investment across the evaluation period. This is positive from an efficiency perspective because it shows that public funding is used alongside business resources, increasing the total value of supported investment activity. However, it does not demonstrate that the full amount of business contribution was additional. Some firms may have proceeded with some or all of the expenditure without LEO support, while others may have invested later, at a smaller scale, or in a different form.

Future monitoring would be strengthened by routinely recording total eligible project cost, public grant paid, business contribution and, where feasible, follow-on investment stimulated by advisory supports. This would allow DETE, Enterprise Ireland and the 31 LEOs to distinguish more clearly between public expenditure, gross associated business contribution and genuinely additional private investment.

7.4 Effectiveness

This section considers the relationship between LEO expenditure and the outcomes and impacts achieved, drawing on available evidence on outputs, reported business benefits, additionality, cost per selected outcome and wider qualitative dimensions of value.

The strongest evidence on effectiveness comes from the beneficiary survey and stakeholder evidence considered in Chapter 5. Beneficiaries reported positive effects on productivity, sales, profitability, operational capacity, management capability, digital adoption, environmental practices, resilience and

investment. These findings suggest that the LEO supports generate meaningful benefits for many businesses, especially through capability-building and incremental business improvement.

The support-specific evidence also indicates that different parts of the programme contribute in different ways. The Business Expansion Grant shows the clearest association with conventional growth effects such as productivity, turnover, profitability and employment. Priming Grant and Feasibility Grant are more closely associated with early-stage progression, validation and readiness for further development. Digital and green supports contribute to operational and transition-related change; while mentoring and training contribute strongly to knowledge, confidence, management capability and strategic direction.

The evidence on additionality is positive but indicative. Many respondents reported that comparable support would have been difficult to access elsewhere, and survey counterfactual evidence suggests that turnover and employment would have been lower for at least some firms without support. However, these findings rely mainly on self-reporting, and the available data do not provide a robust counterfactual or allow precise net impact estimates across the LEO supports.

A further way to consider effectiveness is to examine expenditure in relation to employment change. The LEO EVAC Handbook contains some explicit value-for-money benchmarks, although these should be interpreted carefully. In particular, for Priming Grant, Business Expansion Grant (and certain out-of-scope Research, Development & Innovation (RD&I) cases), appraisers are required to consider metrics including cost per sustained job, cost per new job, ratio of increased export sales to grant support, productivity growth and, for larger cases, benefit-to-cost ratio. The handbook also sets indicative thresholds for job-based metrics. These benchmarks provide useful context, but they are not directly comparable with the programme-level spend-per-AES-net-new-job ratios calculated below. The former are project appraisal thresholds for selected grant cases; the latter are whole-system descriptive ratios.

Using total LEO expenditure and AES net new jobs, the evaluation has prepared indicative spend-per-net-new-job ratios. These ratios should not be interpreted as causal cost-per-job estimates. AES employment change is not support-specific, does not provide a counterfactual, and reflects the wider performance of supported firms rather than jobs directly created by LEO support. Nevertheless, the calculation is useful as a broad proportionality check on the relationship between public expenditure and employment change in the supported business base

Table 7.6 Programme-level spend per AES net new job

Measure	2015 2025 total
Total LEO expenditure	€488.4m
AES net new jobs	30,137
Spend per AES net new job	€18,343

Source: Enterprise Ireland monitoring data; analysis by evaluation team

The estimated spend per AES net new job over 2015–2025 is approximately **€18,343**. This sits within the internal appraisal benchmark ranges for job-based supports, although the comparison is imperfect. It is also important to note that total LEO expenditure funds a much broader support architecture than job-creating grants alone. It includes training, mentoring, advisory supports, start-up supports, digital and green transition supports, local enterprise development and wider operational functions.

The 2020 Covid-19 pandemic period is an important distortion in the expenditure series. Total LEO expenditure increased sharply in 2020 due to Covid-related supports, some of which sit outside the scope of this evaluation and some of which were directed at business survival rather than employment expansion. A sensitivity excluding 2020 is therefore useful.

Table 7.7 Sensitivity excluding 2020

Measure	2015 2019 and 2021 2025
Total LEO expenditure	€452.9m
AES net new jobs	31,631
Spend per AES net new job	€14,318

Source: Enterprise Ireland monitoring data; analysis by evaluation team

Excluding 2020 gives a slightly lower spend per AES net new job of approximately €14,318. This is reassuring as a proportionality indicator, particularly given that the expenditure denominator includes a much wider set of supports and functions than job creation activity alone. However, the ratio remains a descriptive metric and should not be read as a measure of net additional employment impact.

Table 7.8 Caveats on interpreting spend per AES net new job

Caveat	Implication
AES net new jobs are not support-specific	The ratio cannot identify the cost-effectiveness of individual schemes
AES does not provide a counterfactual	The ratio is not a net additional cost-per-job estimate
Total LEO expenditure includes wider support architecture	The denominator includes more than job-creating grant expenditure
2020 was exceptional	Covid-related expenditure distorts the time series
Some LEO benefits are not employment-based	The ratio understates value where supports improve capability, resilience, digital adoption or sustainability

Source: Evaluation team assessment

A narrow spend-per-job view would understate the value of the LEO model because much of the programme is designed to build capability, resilience, sustainability, digital adoption and local enterprise capacity rather than only short-term job creation. This is particularly important for mentoring, training, Digital for Business, Green for Business and Energy Efficiency Grant, where the main benefits may appear through improved capability, decision-making, operating practices, cost savings or adaptation rather than immediate job creation.

Table 7.9 Qualitative dimensions of value for money

Dimension	How it contributes to value for money
Local accessibility	Reduces search costs and barriers to support for small firms
Trust and relationship-based support	Encourages engagement by firms that may not access more formal or centralised provision
Capability-building	Improves management knowledge, confidence and decision-making
Business resilience	Helps firms adapt to shocks, cost pressures and operational challenges
Digital and green transition	Supports firms to modernise, improve efficiency and respond to policy priorities
Ecosystem and referral value	Helps firms navigate a complex support landscape and progress towards other provision
Equity value	Maintains access to enterprise support across places and for firms outside mainstream scaling criteria

Source: Evaluation team assessment, drawing on monitoring, survey and stakeholder evidence

The case-study evidence also supports the qualitative value-for-money assessment by illustrating how relatively modest interventions can contribute to business decisions, investment, process improvement, management capability and resilience (Appendix 9). The strongest value-for-money lesson is not that any single support is sufficient on its own, but that the LEO model can add value when businesses are able to access the right combination of financial and advisory support at the right point in their development.

Overall, the effectiveness evidence is positive. The LEO supports appear to generate meaningful business benefits, and the indicative spend-per-AES-net-new-job ratios are broadly proportionate when interpreted cautiously. However, the evidence is stronger for contribution than for precise attribution. The main limitation is not the absence of value, but the limited ability of current data systems to quantify net additional impact or compare effectiveness across schemes.

7.5 Equity

This section considers whether LEO resources and benefits are distributed fairly across relevant firms and places, with particular attention to geography, business stage and other beneficiary characteristics where the available evidence allows.

The LEO model has a strong equity rationale because it is locally distributed across the country and intended to provide accessible support for micro and small businesses that may otherwise find the support system difficult to navigate. The local structure is particularly important for smaller firms, early-stage businesses, rural businesses and locally traded firms that may not meet Enterprise Ireland criteria but still contribute to local employment, resilience and economic life.

The evidence base on equity is uneven. Geography and business stage can be examined reasonably well using survey and administrative data. However, the evidence is much weaker on other equity dimensions, including gender, ownership characteristics and other under-represented or equality-relevant groups, because these are not captured consistently in routine monitoring and were not available as robust survey variables for outcome analysis.

Table 7.10 Equity evidence availability by beneficiary group

Equity dimension	Evidence availability	Assessment implication
Geography	Moderate	Survey and expenditure data allow some comparison between Dublin, other regions and LEO areas
Business stage	Moderate	Survey data allow analysis by start-up, early-stage, established and mature businesses
Sector	Partial	Survey data provide some sector profile, but not always sufficient for robust outcome comparison
Gender / ownership characteristics	Limited	Not consistently available in routine monitoring for outcome analysis
Under-represented or equality-relevant groups	Limited	Insufficient evidence for robust comparative assessment
Rurality / peripheral location	Partial	Geography can be used as a proxy, but rurality is not consistently captured directly

Source: Evaluation team assessment, drawing on policy, monitoring, survey and stakeholder evidence

As shown in Table 7.11, overall satisfaction is high both in Dublin and the rest of Ireland, though somewhat higher outside Dublin. The outcome measures show some variation by geography, but these should be interpreted cautiously because the valid-response bases for the Q3.24 outcome items are relatively small, particularly for Dublin.

Table 7.11 Selected beneficiary experience and outcome measures by geography

Measure	Dublin	Rest of Ireland
Very satisfied / satisfied with support	81.1%	86.0%
Reported increased productivity	54.5%	47.1%
Reported increased sales turnover	48.5%	44.1%
Reported increased profitability	35.7%	40.0%
Reported safeguarding existing jobs	43.3%	37.1%
Reported employing additional people	39.4%	27.9%

Source: LEO beneficiary survey, Q2.1, Q2.9 and Q3.24; analysis by evaluation team. Satisfaction percentages are based on valid Q2.9 responses. Outcome percentages show "Yes" responses and exclude "Don't Know / Not Relevant". Geography is based on Q2.1.

The additionality evidence also suggests a broadly similar pattern across geography. As shown in Table 7.12, respondents both inside and outside Dublin commonly reported that similar support would have been difficult to access elsewhere. This supports the interpretation that LEOs play an access-enhancing role across the country, rather than only in more peripheral or rural areas.

Table 7.12 Indicative additionality by geography

Measure	Dublin	Rest of Ireland
Difficult / very difficult to access similar support elsewhere	59.0%	60.2%
Neither easy nor difficult	15.6%	12.1%
Easy / very easy to access similar support elsewhere	9.8%	7.3%
Don't know	15.6%	20.4%

Source: LEO beneficiary survey, Q2.1 and Q4.5; analysis by evaluation team. Percentages are based on valid non-blank Q4.5 responses by geography. Geography is based on Q2.1

Stakeholder and focus group evidence reinforces the equity value of local delivery. Heads of Enterprise emphasised the importance of LEOs for rural areas and for locally traded businesses that may not meet Enterprise Ireland criteria but still make a meaningful contribution to employment, community resilience and local economic life. This supports the view that geographical equity is not only about the distribution of expenditure, but about maintaining accessible support for firms whose economic value is local or regional rather than export led.

The main equity caveat is that the current evidence base does not allow robust assessment across all relevant beneficiary groups. It is therefore not possible to conclude with confidence whether outcomes differ by gender, ownership characteristics, ethnicity, disability, or other under-represented groups. This is a limitation for future evaluation and performance monitoring.

Overall, the equity evidence is positive in relation to geography and business accessibility, but incomplete in relation to wider beneficiary characteristics. The locally distributed LEO model appears to support equitable access to enterprise support across places, but future monitoring should be strengthened to allow more systematic assessment of who benefits from support and whether some groups face barriers to access, progression or outcomes.

7.6 Overall value for money

Overall, the evidence supports a **positive but qualified judgement** that the LEO supports represent a credible and proportionate use of public resources. The strongest basis for this judgement is that the LEO model combines substantial national reach with locally accessible support, positive beneficiary experience, reported business benefits, and a support mix that addresses clear market and capability gaps among micro and small firms. The programme is not simply funding a set of discrete grants or activities; it is maintaining a locally embedded enterprise support architecture that provides advice, mentoring, training, financial assistance, signposting and progression support across different stages of the business journey.

Assessed against the **4Es**, the value for money position is strongest where the evidence relates to reach, beneficiary experience and reported business outcomes, and weakest where it depends on precise quantification of management costs, net additional impact or comparative scheme-level cost-effectiveness.

On **economy**, the evidence on LEO pay data provide a useful proxy for the staffing and core delivery cost base of the wider LEO system. However, this does not provide a full support-level management-cost series, and the figures relate to total LEO activity rather than only to the in-scope supports. This limits the ability to assess whether administration and delivery costs are proportionate for individual schemes. The evidence does, however, identify avoidable cost drivers, including manual processes, fragmented reporting systems, inconsistent interpretation, staffing churn, administrative burden and the absence of a shared CRM system. The main opportunity is therefore not to reduce the local footprint of the 31 LEOs, which is central to its value, but to reduce avoidable administrative cost through better shared systems, clearer guidance and more proportionate processes.

On **efficiency**, the picture is more positive. The LEO supports have delivered activity at substantial scale, with significant growth in mentoring, training, digital, green and business expansion activity over the evaluation period. Available monitoring data show that several key activity targets were exceeded in 2025, particularly training, mentoring, Green for Business and Digital for Business approvals. The in-scope grant supports also mobilise business co-investment, with the main 50% intervention-rate grants implying substantial matched expenditure by businesses. However, efficiency is harder to assess at scheme level because, while the monitoring framework captures expenditure, approvals, payments and participation volumes, these output measures are not directly comparable across supports and are not consistently linked to quality, client progression or outcomes.

On **effectiveness**, the value for money case is supported by beneficiary survey evidence, stakeholder evidence and administrative data. Beneficiaries report positive effects on productivity, sales, profitability, operational capacity, management capability, digital adoption, environmental practices, resilience and investment. The strongest reported effects vary by support type: Business Expansion Grant is most closely associated with conventional growth outcomes; Priming and Feasibility Grants with early-stage progression and validation; Digital and Green supports with operational improvement and transition-related change; and mentoring and training with capability, confidence and management development. Indicative additionality evidence also suggests that many beneficiaries would have found similar support difficult to access elsewhere, and that turnover and employment would have been lower in the absence of support for at least some firms. However, these findings are mainly self-reported and should be treated as evidence of contribution rather than precise net impact.

On **equity**, the LEO model has clear strengths. Its locally distributed structure means support is available across the country, and survey evidence indicates positive beneficiary experience both inside and outside Dublin. The difficulty many firms report in accessing similar support elsewhere also suggests that LEOs play an equity-enhancing role by reducing information and access barriers, particularly for smaller, local and potentially more peripheral firms. However, the evidence base is weaker on other equity dimensions, including gender, ownership characteristics and other under-represented or equality-relevant groups. This limits the strength of any conclusion about whether benefits are equitably distributed across all relevant beneficiary groups.

The employment-based value for money indicators are broadly reassuring but should not be over-interpreted. The indicative programme-level ratio of total LEO spend per AES net new job sits within the internal appraisal benchmark range for job-based supports, particularly when 2020 is excluded. This is reasonably positive given that total LEO expenditure funds a much broader support architecture than job-creating grant aid alone. However, the AES measure is not support-specific, does not provide a counterfactual, and should not be treated as a causal cost-per-job estimate. It is best understood as supporting evidence that the scale of employment outcomes associated with LEO-supported firms is broadly proportionate to the level of public expenditure.

Taken together, the overall value for money judgement is that the LEO supports appear to deliver **reasonable to good value for money**. The case is strongest in relation to relevance, reach, accessibility, beneficiary experience and reported business benefits. It is more qualified in relation to economy, precise additionality and comparative cost-effectiveness. The principal issue is therefore not that the LEO supports lack value, but that current evidence and delivery systems do not yet allow that value to be demonstrated, managed or improved as clearly as they should.

The main implication is that future value for money can be strengthened through better shared data infrastructure, a more outcome-focused performance framework, clearer referral and progression tracking, more proportionate application and compliance requirements, and more systematic recording of business contributions and follow-on investment. These changes would not alter the core rationale for the LEO model. Rather, they would help ensure that a broadly valuable local enterprise support system can demonstrate its impact more robustly, reduce avoidable administrative cost and continue to improve the relationship between public investment, business outcomes and wider policy objectives.

8 Conclusions & recommendations

8.1 Conclusions

Overall, the evaluation supports a **positive but moderately qualified conclusion** on the relevance, performance and value of the LEO support model. The evidence indicates that the 31 LEOs continue to play a distinctive and important role within Ireland's enterprise support landscape, particularly as a locally accessible first point of contact for micro and small businesses. The model's value lies not only in the delivery of individual schemes, but in the wider support architecture LEOs provide: local advice, mentoring, training, financial assistance, signposting and relationship-based support across different stages of the business journey.

The strategic rationale for the model remains strong. If anything, it has become more important as the operating context for small firms has become more demanding. Businesses now face pressures around digitalisation, decarbonisation, competitiveness, productivity, skills, resilience and cost inflation, alongside more traditional start-up and growth challenges. The LEO supports broadly reflect these priorities, spanning business formation, feasibility testing, early growth, digital adoption, green transition, capability-building and expansion. This means the LEO supports remain well aligned with national enterprise policy and with the practical needs of the intended beneficiary base.

The evidence also suggests that the LEO model is highly valued by beneficiaries. Survey results point to strong satisfaction with LEO support, particularly in relation to staff professionalism, accessibility, responsiveness, clarity and relevance. Stakeholder and Heads of Enterprise evidence reinforce this picture, emphasising the importance of local proximity, trust, flexibility and the ability of businesses to access practical support without first having to navigate a complex national system. The local character of the model is therefore not simply a delivery feature; it is central to the model's value and additionality.

The LEO supports appear to have generated meaningful benefits for many supported businesses. The strongest evidence relates to improvements in productivity, sales, profitability, operational capacity, management capability, digital adoption, environmental practice, business resilience and confidence. The Business Expansion Grant shows the clearest association with conventional growth effects, while Priming and Feasibility Grants support early-stage progression and validation. Digital and green supports contribute to operational improvement and transition-related change; while mentoring and training are particularly important in building management capability, business knowledge, strategic direction and confidence. Across the LEO supports, many of the most important effects are enabling effects that help firms make better decisions, invest, adapt and progress.

There is also indicative evidence of additionality. Many beneficiaries reported that comparable support would have been difficult to access elsewhere, and survey counterfactual evidence suggests that turnover and employment would have been lower for at least some firms without LEO support. The strongest additionality case appears to relate to early-stage firms, smaller locally traded businesses, rural businesses, and firms that may not fit easily within Enterprise Ireland's export or scaling criteria but nevertheless contribute to local employment and economic resilience. However, additionality cannot be quantified precisely across the LEO supports, and the evidence should be interpreted as indicating contribution rather than definitive causal impact.

The evaluation also finds that the LEO model is broadly coherent, but not fully integrated. The support mix makes sense in principle as a business journey, and the division of labour between LEOs, Enterprise Ireland, the National Enterprise Hub and other provision is broadly defensible in policy terms. In practice, however, businesses and stakeholders still encounter complexity, weak handovers and some ambiguity at the boundaries of the system. The most significant coherence challenge is not wholesale duplication, but navigability, referral quality, progression tracking and clarity about how different supports fit together from the user perspective.

Delivery and governance arrangements are also broadly functional, but under strain. The hybrid model of national coordination and local authority delivery remains appropriate, and the network is delivering activity at substantial scale. However, recurring issues include annualised budgets, shifting approval capacity, staffing pressures, administrative burden, inconsistent interpretation, fragmented reporting systems and the absence of a shared CRM or equivalent client-management infrastructure. These issues limit efficiency, weaken client journey tracking and reduce the ability of the system to evidence outcomes consistently. They do not undermine the case for the LEO model, but they do point to the need for stronger shared systems and clearer national standards.

The current performance framework is useful for monitoring activity, but less effective as a rounded performance management and evaluation system. It captures participation, approvals, payments, jobs measures and selected activity targets, but is weaker on support-specific outputs/outcomes, client progression, referral quality, outcome persistence and additionality. This means the system can show that support is being delivered at scale, but is less able to demonstrate clearly and consistently what difference that support is making. Strengthening the performance framework is therefore central to improving future accountability, learning and value for money.

On value for money, the overall judgement is positive but necessarily qualified. The LEO supports appear to represent a credible and proportionate use of public resources, given its national reach, strong beneficiary experience, reported business benefits, local accessibility and role in addressing market and capability gaps among micro and small firms. Employment-based ratios are broadly reassuring when treated as descriptive indicators rather than causal impact estimates, and the grant-based supports mobilise business co-investment. However, the value for money case is weaker where it depends on precise quantification of management costs, net additional impact or comparative scheme-level cost-effectiveness. The issue is not that the LEO supports lack value, but that current systems do not yet allow that value to be demonstrated or managed as clearly as they should.

Taking the evidence together, the LEO model remains **relevant, valued and broadly fit for purpose**, but maintaining that position will require adaptation and strengthening rather than simple continuity. The priority is not wholesale redesign. The core model of locally accessible support should be retained. However, it should be supported by better data infrastructure, a shared client-management system, clearer referral and progression pathways, more proportionate administrative processes, stronger outcome monitoring, and a more explicit balance between national consistency and local flexibility.

The overall conclusion is therefore that **the 31 LEOs provide an important and continuing platform for small business support in Ireland**. They reach firms that may otherwise struggle to access appropriate assistance, supports a wide range of business needs, and contributes to capability, resilience and growth across the small business base. Their future effectiveness will depend on preserving the strengths of local delivery while modernising the systems, processes and evidence base that underpin it.

8.2 Recommendations

The evaluation points to a clear overall conclusion: the LEO model should be **retained and strengthened**. The recommendations therefore focus on improving the systems, processes and evidence base that support the model, rather than changing its core rationale. The aim is to preserve the local accessibility and responsiveness that businesses value, while improving consistency, efficiency, referral pathways, performance evidence and value for money.

Recommendation 1: Implement a shared CRM and client journey tracking system

Priority: High

Indicative timescale: Short to medium term

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

DETE and Enterprise Ireland should prioritise implementation of a shared CRM, or equivalent client-management system, across the 31 LEOs. This should allow LEOs to record client interactions, supports received, referrals, progression, follow-up actions and outcomes in a consistent way.

This is the most important enabling recommendation because it would support several improvements at once: reduced manual reporting, better visibility of client journeys, stronger referral tracking, improved performance monitoring, and a stronger evidence base for future evaluation and value for money assessment. The system should be designed around practical LEO use, not only reporting requirements, and should be aligned with referral processes involving Enterprise Ireland, the National Enterprise Hub and other relevant providers.

Recommendation 2: Strengthen the performance framework beyond activity counts

Priority: High

Indicative timescale: Short term design; medium term implementation

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

DETE and Enterprise Ireland should redesign the LEO performance framework so that it retains core activity measures but adds a more balanced set of indicators covering delivery, outputs, outcomes, progression, additionality and equity. The revised framework should define outputs consistently, distinguishing between participants, unique businesses, approvals, completed projects and payments. This would make future cost-per-output analysis more meaningful and reduce the risk of comparing unlike measures across supports.

The future framework should include:

Level	Suggested focus
Core delivery	Unique businesses supported, applications, approvals, payments, timeliness, completion and drop-out rates
Support-specific outputs	Digital action plans completed, green measures implemented, feasibility projects proceeding, mentoring plans completed, expansion projects completed
Cross-cutting outcomes	Turnover, employment, productivity proxy, digital adoption, management capability, resilience, environmental improvement
Progression	Movement between LEO supports, referrals to Enterprise Ireland, referrals from the National Enterprise Hub, onward supports taken up
Additionality and equity	Difficulty accessing similar support elsewhere, acceleration of change, business stage, geography and under-represented groups where feasible

The framework should remain proportionate and usable. It should support management and learning, not simply add reporting burden.

Recommendation 3: Clarify and strengthen referral pathways between LEOs, Enterprise Ireland and the National Enterprise Hub

Priority: High

Indicative timescale: Short term

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

DETE, Enterprise Ireland and the National Enterprise Hub should work with the LEO Centre of Excellence and the 31 LEOs to develop a clear, practical and consistently applied referral framework

across the enterprise support system. The purpose should be to ensure that businesses experience a joined-up journey through the system, rather than having to navigate separate institutional boundaries between LEOs, Enterprise Ireland, the National Enterprise Hub and other specialist providers.

The evidence indicates that the broad division of roles between LEOs and Enterprise Ireland is defensible, with LEOs providing accessible first-line and local support, and Enterprise Ireland supporting firms with greater export, innovation and scaling potential. However, the evaluation also found that progression between organisations is weaker in practice than it is in formal role definitions. Stakeholder evidence points to weak referral processes, loss of named contacts, variable warm-handover arrangements, and uncertainty about how referrals are followed up or completed. The LEO Policy Statement also places clear emphasis on ensuring a progression pathway from LEO to Enterprise Ireland, including continued joint engagement at county level to sustain appropriate company transfers.

The referral framework should therefore set out:

Clear referral criteria and triggers. There should be agreed criteria for when a business should remain with the LEO, when it should be referred to Enterprise Ireland, when it should be referred to the National Enterprise Hub, and when it should be directed to another specialist provider. This should cover both upward progression from LEO to Enterprise Ireland and other forms of referral, including firms that approach the National Enterprise Hub first, firms that need local follow-up after national triage, and firms that may not yet be ready for Enterprise Ireland support but require a development pathway.

Named or functional contact routes. Each LEO should have clear contact routes into Enterprise Ireland and the National Enterprise Hub. These do not necessarily need to depend on a single named individual, but they should provide reliable functional contacts, escalation routes and response expectations. This is important because stakeholder evidence suggests that the weakening of named relationships has reduced the effectiveness of warm handovers in some areas.

Minimum referral standards. A referral should include enough information for the receiving organisation to act without asking the business to repeat its story unnecessarily. As a minimum, referral records should include the business name, contact details, sector, location, stage of development, supports already received, reason for referral, intended next step, and any relevant deadlines or funding/application issues. Referral standards should be proportionate and should not create unnecessary administrative burden.

Warm-handover arrangements for higher-potential or more complex cases. For firms with significant growth, export, innovation, productivity or investment potential, referral should normally involve a warm handover rather than passive signposting. This could include a joint call, email introduction, short referral note, or where appropriate a three-way discussion between the business, the LEO and Enterprise Ireland or the National Enterprise Hub. The aim should be to preserve the trust built through the local LEO relationship while giving the business confidence that the next stage of support is relevant and responsive.

Feedback loops. The referring organisation should be informed whether the referral was accepted, whether contact was made, what broad outcome followed, and whether further LEO support is required. This is particularly important where a business is not accepted into Enterprise Ireland support, is better suited to further LEO development support, or needs a staged pathway before progressing. Without such feedback, LEOs cannot manage client relationships effectively or learn whether referrals are working.

Referral tracking and reporting. Referral data should be recorded consistently, ideally through the proposed shared CRM or an interim tracking mechanism. At minimum, the system should capture referrals made, referrals accepted, referrals declined, referrals completed, time taken to respond, onward supports taken up, and cases returned to the LEO for further support. This should link directly to the wider recommendation on client journey tracking and performance monitoring.

A clearer operational role for the National Enterprise Hub. The National Enterprise Hub should be positioned as a simplifier, triage mechanism and navigation layer within the wider support system, not as a competing front door to local LEO support. Its role should be clearest where businesses are unfamiliar with the support landscape, have cross-cutting needs, or require direction to the most appropriate provider. Where a business is locally rooted, early-stage, or already known to a LEO, the Hub should reinforce rather than duplicate the LEO relationship. This reflects evaluation evidence that the Hub has a coherent potential role, but that its operational relationship with LEOs is still bedding in and needs to be clarified to avoid becoming an additional layer rather than a simplifier.

Implementation should begin with a short mapping exercise of existing referral routes, followed by agreement of a national referral protocol and a small number of pilot areas to test the approach. The protocol should then be refined and rolled out nationally, supported by guidance, simple templates, staff briefings and agreed monitoring measures. The aim should not be to remove local flexibility, but to ensure that all businesses can expect a consistent minimum standard of referral, handover and follow-up regardless of where they enter the system.

The expected benefit is a more seamless business journey, improved progression of suitable firms from LEO to Enterprise Ireland support, clearer use of the National Enterprise Hub, reduced duplication, and better evidence on how businesses move through the enterprise support ecosystem. This should strengthen coherence and efficiency while preserving the local accessibility that is central to the LEO model.

Recommendation 4: Simplify application, claims and compliance processes

Priority: High

Indicative timescale: Short term review; medium term implementation

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

Enterprise Ireland and DETE should review application, claims and compliance requirements across the in-scope supports, with the aim of reducing burden for both businesses and LEO staff. Requirements should be proportionate to the scale, risk and complexity of the support.

Particular attention should be given to lower-value grants and supports where the administrative burden may be high relative to the value of assistance. The review should consider shorter forms, clearer guidance, standardised templates, fewer duplicate information requests, clearer process maps, and more predictable timelines for decisions and payments.

Recommendation 5: Preserve local flexibility while strengthening national standards

Priority: High

Indicative timescale: Short to medium term

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

The LEO model should continue to combine national coordination with local delivery. Local flexibility is central to the model's value, especially where LEOs are responding to different rural, urban, sectoral and local authority contexts. However, this flexibility should sit within clearer national standards.

These should include common expectations on eligibility interpretation, minimum service standards, documentation, referral processes, application timelines and client journey tracking. This would be aided by trialling new supports / changes to supports and by working with those involved in / experience of support delivery. The aim should be **consistency in standards, not uniformity in local delivery**.

DETE and Enterprise Ireland may also consider allowing a limited locally flexible budget allocation, within national parameters, so that LEOs can respond to specific local opportunities, clusters or emerging needs without undermining national consistency.

Recommendation 6: Improve budget and approval planning arrangements

Priority: Medium–High

Indicative timescale: Medium term

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

DETE and Enterprise Ireland should explore ways to provide greater predictability in annual budgets, approval capacity and staffing-related funding. This could include earlier confirmation of annual allocations, clearer in-year approval rules, and, where feasible, multi-annual planning assumptions for core delivery capacity and high-demand support areas.

This would help LEOs plan activity, retain staff, manage demand and reduce inefficiencies caused by short-term budget uncertainty. It would also reduce the risk that approval capacity, payment timing and actual business delivery fall out of alignment within a single financial year.

Recommendation 7: Review the fit of support design with changing business models

Priority: Medium–High

Indicative timescale: Medium term

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

DETE, Enterprise Ireland and the 31 LEOs should review whether the design and eligibility criteria of key supports remain aligned with current small business models. The review should consider issues such as part time senior roles, remote and international recruitment, firms without traditional premises, locally significant non-exporting businesses, and the balance between full-time employment assumptions and more flexible business growth models.

This does not require wholesale redesign of the LEO supports. Rather, the objective should be to test whether existing rules remain fit for purpose and to identify targeted adjustments where eligibility or design features no longer reflect how small firms grow, recruit, invest or access specialist expertise.

Recommendation 8: Strengthen progression pathways across the LEO supports, while protecting the start-up and entrepreneurship pipeline

Priority: Medium

Indicative timescale: Short to medium term

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

DETE, Enterprise Ireland and the 31 LEOs should present and manage the LEO supports more clearly as a business development journey, rather than as a set of separate supports. This should include clearer progression routes from start-up and early-stage advice through to feasibility testing, priming, mentoring, digital and green supports, business expansion and, where appropriate, onward referral to Enterprise Ireland or other specialist provision.

In doing so, DETE and Enterprise Ireland should ensure that the broadened LEO remit around productivity, digitalisation, sustainability and locally traded sectors does not weaken the original entrepreneurship and start-up pipeline role. Early-stage entrepreneurs and very small firms are among the groups least likely to be supported elsewhere, so Start Your Own Business, mentoring and early-

stage advisory support should remain visible within planning, resourcing and performance monitoring. Monitoring should also consider whether delivery targets for newer policy-priority supports are crowding out enterprise formation activity.

This recommendation is intended to strengthen the coherence of the LEO supports while preserving the LEO role across the full business journey, from enterprise formation through to growth, adaptation and progression.

Recommendation 9: Protect and strengthen mentoring and capability-building supports

Priority: Medium

Indicative timescale: Medium term

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

Enterprise Ireland and the 31 LEOs should continue to prioritise mentoring, training, networking and management development as core elements of the LEO offer. These supports are strongly valued by beneficiaries and appear central to capability-building, confidence, decision-making and strategic direction.

The review should consider whether mentor rates, mentor panel capacity, quality assurance and matching processes remain adequate. It should also consider whether training provision should be better differentiated from other providers, such as Skillnet, Chambers, Local Authorities and Education and Training Boards (ETBs), with LEOs focusing where they add most value: practical, in-company, locally accessible and business-development-focused support.

Recommendation 10: Improve measurement of business contribution, leverage and follow-on investment

Priority: Medium

Indicative timescale: Medium term

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

Future monitoring should routinely record total eligible project cost, public grant paid, business contribution and, where feasible, follow-on investment stimulated by advisory supports such as Green for Business and Digital for Business.

This would strengthen future value for money assessment by allowing DETE and Enterprise Ireland to distinguish between public expenditure, gross associated business contribution and genuinely additional private investment. It would also make the leverage effect of the LEO supports clearer and more defensible.

Recommendation 11: Strengthen equity and beneficiary profiling evidence

Priority: Medium

Indicative timescale: Medium term

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

DETE and Enterprise Ireland should improve the evidence base on who benefits from LEO supports. Geography and business stage are already useful lenses, but monitoring should be strengthened where feasible to capture gender, ownership characteristics, under-represented groups, rurality, sector and business type in a proportionate and General Data Protection Regulation (GDPR) compliant way.

This would allow future assessments to say more confidently whether support is being distributed equitably and whether particular groups face barriers to access, progression or outcomes.

Recommendation 12: Use periodic evaluation modules for deeper outcome evidence

Priority: Medium

Indicative timescale: Medium to longer term

Lead owner: DETE / Enterprise Ireland

Supporting partners: the 31 LEOs and their Local Authorities

Not all outcomes need to be measured through routine monitoring. DETE and Enterprise Ireland should introduce periodic evaluation modules or rotating beneficiary surveys to examine issues such as additionality, client progression, business survival, productivity, digital adoption, green outcomes, and satisfaction with referrals.

This would avoid overloading the routine performance system while still generating stronger evidence on impact and value for money over time. These modules could be aligned with future evaluation cycles, annual reporting priorities or specific policy questions.

Table 8.1 Summary prioritisation of recommendations

No.	Recommendation	Lead owner	Supporting partners	Priority	Indicative timescale
1	Implement a shared CRM and client journey tracking system	*DETE / Enterprise Ireland*	*the 31 LEOs and their Local Authorities*	**High**	Short to medium term
2	Strengthen the performance framework beyond activity counts	DETE / Enterprise Ireland	*the 31 LEOs and their Local Authorities*	**High**	Short term design; medium term implementation
3	Clarify referral pathways between LEOs, EI and NEH	*DETE / Enterprise Ireland*	*the 31 LEOs and their Local Authorities*	**High**	Short term
4	Simplify application, claims and compliance processes	*DETE / Enterprise Ireland*	*the 31 LEOs and their Local Authorities*	**High**	Short term review; medium term implementation
5	Preserve local flexibility while strengthening national standards	DETE / Enterprise Ireland	*the 31 LEOs and their Local Authorities*	**High**	Short to medium term
6	Improve budget and approval planning arrangements	DETE / Enterprise Ireland	*the 31 LEOs and their Local Authorities*	**Medium–High**	Medium term
7	Review the fit of support design with changing business models	DETE / Enterprise Ireland	*the 31 LEOs and their Local Authorities*	**Medium–High**	Medium term
8	Strengthen progression pathways across the LEO supports	*DETE / Enterprise Ireland*	*the 31 LEOs and their Local Authorities*	**Medium**	Short to medium term
9	Protect and strengthen mentoring and capability-building supports	*DETE / Enterprise Ireland*	*the 31 LEOs and their Local Authorities*	**Medium**	Medium term
10	Improve measurement of business contribution, leverage and follow-on investment	*DETE / Enterprise Ireland*	*the 31 LEOs and their Local Authorities*	**Medium**	Medium term
11	Strengthen equity and beneficiary profiling evidence	DETE / Enterprise Ireland	*the 31 LEOs and their Local Authorities*	**Medium**	Medium term
12	Use periodic evaluation modules for deeper outcome evidence	DETE / Enterprise Ireland	*the 31 LEOs and their Local Authorities*	**Medium**	Medium to longer term

Taken together, these recommendations are intended to strengthen the LEO model rather than replace it. The evidence does not point to a need for wholesale redesign. It points instead to the need to preserve the local accessibility and flexibility that make the LEO model valuable, while improving the common systems, performance framework, referral pathways, administrative proportionality and evidence base that allow the model to operate effectively at national scale.

Appendices

These appendices provide programme-level analysis for the main LEO supports in scope, supplementing the cross-cutting findings presented in the main report. Each appendix follows a common structure covering programme rationale, scale and reach, outcomes and evidence of contribution, delivery considerations, and summary assessment, while the depth of analysis varies in line with the scale, maturity and evaluability of the support concerned. Taken together, the appendices are intended to provide a proportionate but consistent evidence base on how different elements of the LEO supports have performed across the business journey.

A1 Formation: Start your own business

Introduction

This appendix provides a concise assessment of the **Start Your Own Business (SYOB)** programme, drawing together documentary evidence, beneficiary survey findings and relevant stakeholder views. It follows the same broad assessment framework as the other programme appendices, covering scheme overview and strategic fit, inputs and activity, outcomes and impacts, delivery considerations and an overall conclusion. As with other parts of the evaluation, the evidence base is uneven. In particular, SYOB is a long-established and high-volume programme, but the routine monitoring data are relatively weak at support level, meaning that conclusions rely more heavily on participant data, survey evidence and documentary interpretation than for some other supports.

Scheme overview and strategic fit

SYOB is the LEOs' flagship **early-stage enterprise formation** support. Impact reporting describes it as a highly accessible course designed to help individuals assess the viability of a business idea, covering areas such as business planning, sales and marketing, employment legislation, finance and taxation. It is aimed at people with a business idea they want to develop, those considering self-employment as a realistic option, and those who have recently started a business. The impact reports also describe SYOB as many participants' first introduction to their LEO and note its role in signposting participants to other LEO and wider state supports as they progress.

This positioning is consistent with the wider role of the LEO system as a **locally delivered entry point** for micro and small businesses and with the programme logic discussed in the main report. In strategic terms, SYOB fits most clearly with policy priorities around **entrepreneurship, enterprise formation and early-stage capability-building**. It also appears to serve an important gateway function within the wider support ecosystem. As one survey respondent put it, **"The Start Your Own Business course gave me the know-how to initially set up my business".** Another noted that **"Getting initial support helped give me the confidence in [my] initial business idea".** These comments align closely with the way the programme is framed in the documentary sources: not as a specialist growth scheme, but as an accessible first step into entrepreneurship.

Inputs, activities and outputs

SYOB is a relatively low-cost but high-volume part of the LEO supports. As shown in Table A1, expenditure increased from **€0.76 million in 2015 to €0.99 million in 2025**, representing growth of **30%**. Over the same period, the number of recorded participants increased from **3,411 to 5,684**, representing growth of **67%**. On a simple indicative basis, spend per participant fell from around **€223 to €174** over the same period. This suggests that the programme has grown in scale while remaining relatively inexpensive per participant, although this should be interpreted with caution because participant counts are not unique businesses and therefore do not represent cost per unique firm supported.

The evidence base for outputs is weaker than for many other supports. As shown in **Table A2**, there is **no routinely recorded LEO-level output focused on SYOB in isolation**, and no associated target measure. The nearest routine measure is overall **training participants**, but this captures all businesses attending training and does not isolate SYOB participants at local level. Enterprise Ireland has, however, provided headline national figures on SYOB programme numbers and participants by year. The monitoring material is explicit that this is a relatively weak basis for support-level performance assessment.

The beneficiary survey nonetheless provides a useful picture of reach. As shown in **Table A3**, **31.2%** of survey respondents reported having received SYOB, and **20.3%** identified it as one of the most important supports they had received. The survey also shows that take-up is concentrated where one would expect: the programme is most prominent among **businesses not yet established (57.3%)** and

recent starts aged 0–2 years (45.2%), with lower reported take-up among more established firms. This supports the view that SYOB is broadly reaching the intended early-stage target group.

Outcomes and impacts

The survey evidence points to a positive outcome picture, particularly in relation to **formation, preparedness and early-stage business development**. As shown in **Table A4**, **85.9%** of respondents to the relevant question reported that they **went ahead and established a business**. While this does not establish causality, it is a useful indicator that the programme is associated with progression from idea to business formation for a large share of participants.

The support-specific outcome questions also suggest positive business effects. Among valid responses, around **66%** reported increased productivity, **56%** increased sales turnover, **57%** increased profitability, **36%** that the support had enabled the business to employ additional people, and **45%** that it had helped safeguard existing jobs. These figures should be treated as indicative, particularly because SYOB participants are at different stages of maturity and some of these outcomes will emerge only over time. The stronger evidence lies in the wider benefit questions. Among valid responses, **94%** agreed that SYOB had **helped the business to grow in its early stages**, **84%** that it had **helped validate the business idea**, **81%** that it had **enabled increased operational capacity**, **80%** that it had **encouraged additional investment**, and **79%** that it had supported the **development of new products, services or processes**. This pattern suggests that the programme's primary contribution is not only to immediate commercial outcomes, but also to readiness, confidence and the practical foundations of early-stage development.

This interpretation is supported by wider stakeholder and documentary evidence. The impact report presents SYOB as many people's first introduction to their LEO and as **"the first step on a proven path from start up to growth"**. More generally, feedback from the consultation process/stakeholder engagement (1) on the LEO system reinforces the importance of locally accessible advice, mentoring and support for smaller firms at an earlier stage of development. In that sense, the added value of SYOB appears to lie not simply in course completion, but in helping would-be entrepreneurs become more informed, more confident and more likely to move from intention to action.

Management, delivery and Value for Money (VfM)

From a delivery perspective, SYOB appears to benefit from the same core strengths as the wider LEO model: local accessibility, visibility and relatively low barriers to entry. As a training-based support, it is likely to be more straightforward to access than grant schemes and may therefore perform an important gateway function within the wider LEO supports. The survey evidence on general service quality and overall satisfaction in Chapter 6 is therefore relevant context, even though it is not specific to SYOB. At the same time, some beneficiary comments suggest that awareness and timing can still be improved. One respondent noted: **"I only found out about [the course] after I had already started. I did the course nonetheless, but would have benefited more had I known in advance".** This points to a potential management and signposting issue rather than a flaw in the programme itself.

From a value for money perspective, SYOB looks plausible as a relatively low-cost, high-volume entry support, but the evidence base is too weak to support any precise judgement. Its modest expenditure, substantial participant volumes and apparent targeting of early-stage firms are positive indicators. However, the lack of unique-business output measures, the absence of a target-linked support-specific KPI, and the limited routine follow-up data mean that cost-effectiveness can only be judged in broad terms. The available evidence suggests that SYOB is likely to offer reasonable value as an early-stage formation support, but more robust outcome tracking would be needed to substantiate this more fully.

Overall conclusion

Overall, the evidence suggests that **SYOB is a strategically coherent and useful entry-point support within the LEO supports**, aligned with the network's wider entrepreneurship role. It appears to be reaching the right broad target group, namely prospective entrepreneurs and very early-stage firms, and there is positive survey evidence on business formation, confidence, idea validation and early-stage

development. The programme's main value appears to lie in helping participants move from intention to action and in strengthening the practical readiness and capability needed to establish a business.

The main limitation is evidential rather than conceptual. SYOB is one of the weaker supports in the monitoring system, with no robust LEO-level output metric in isolation and no target-linked performance measure. This means that conclusions are necessarily more dependent on survey evidence and documentary interpretation than on strong routine performance data. On balance, SYOB appears to be a worthwhile and likely additional early-stage support, but one whose contribution would be more convincingly demonstrated if the future performance framework included clearer support-specific progression and follow-up measures.

Table A 1 Start Your Own Business: inputs and activity

Indicator	2015	2025	Change
Expenditure (€m)	0.76	0.99	+30%
Participants	3,411	5,684	+67%
Indicative spend per participant (€)	223	174	-22%

Note: Spend per participant is indicative only. Participant counts are not unique businesses.
Source: Enterprise Ireland monitoring data and evaluation analysis.

Table A 2 Start Your Own Business: evidence and monitoring position

Dimension	Position
Main routine evidence available	Headline national programme and participant figures
LEO-level output in isolation	No
Target-linked metric	No
Main limitation	Participants are not unique businesses and are not available as a robust LEO-level output measure
Overall evidence strength	Weak to moderate

Source: Enterprise Ireland monitoring material and evaluation synthesis.

Table A 3 Start Your Own Business: survey evidence on reach

Measure	Result
Respondents reporting receipt of SYOB	31.2%
Respondents identifying SYOB as most important support	20.3%
Take-up among businesses not yet established	57.3%
Take-up among recent starts (0–2 years)	45.2%
Take-up among mature firms (10+ years)	19.9%

Source: Analysis of LEO beneficiary survey data and evaluation synthesis. Q1.1, Q2.4 and Q2.6

Table A 4 Start Your Own Business: reported outcomes and wider benefits

Measure	Result
Went ahead and established a business	85.9%
Increased productivity	66.1%*
Increased sales turnover	55.6%*
Increased profitability	57.3%*
Allowed the business to employ additional people	35.8%*
Helped validate the business idea	84.1%**
Helped the business grow in its early stages	94.1%**
Enabled increased operational capacity	81.2%**
Encouraged additional investment	79.9%**
Development of new products, services or processes	79.3%**

** Percentage of valid yes/no responses excluding "Don't Know / Not Relevant".*
*** Percentage agreeing/strongly agreeing excluding "Don't Know / Not Relevant".*
Source: Analysis of LEO beneficiary survey data. Q3.1, Q3.2 and Q3.3

A2 Testing & early growth: Priming & feasibility grants

Introduction

This appendix provides a concise assessment of the **Priming Grant** and **Feasibility Grant**, which together occupy an important place in the early-stage part of the LEO supports. While they serve different immediate purposes, they are closely related in practice. The Feasibility Grant is intended to help promoters test the viability of a business idea, product or service before committing further time or investment, while the Priming Grant provides early-stage financial support to young firms as they move from formation into initial growth. Considered together, they illustrate how the LEO model supports businesses through the transition from idea development to operational establishment and early commercialisation.

The appendix draws on documentary evidence, stakeholder views and beneficiary survey findings. As with other scheme-level appendices, the evidence base is uneven. Administrative data provide a useful picture of scale and activity, but are weaker on support-specific outcomes and do not include strong target-linked output measures. The analysis therefore relies substantially on survey evidence and stakeholder interpretation when assessing outcomes, additionality and sustainability.

Scheme overview and strategic fit

The two grants are strategically coherent within the wider LEO offer because they support adjacent stages of business development. **Feasibility Grant** is designed to reduce uncertainty at the pre-start or concept-testing stage by helping firms assess technical or commercial viability, market demand and next-stage readiness. **Priming Grant** then provides support to younger firms, generally within the first 18 months of trading, to help them establish themselves and build operational capacity. Together, they align closely with the role of the LEOs as a locally accessible entry point for micro and small businesses, particularly at an early stage where firms may not yet be ready for more specialist or growth-oriented provision.

This logic is consistent with the broader policy framing of the LEO system. The chapters in the main body of the report showed that the LEO supports are intended not only to support established businesses, but also to encourage entrepreneurship, de-risk early-stage business development and provide a pathway into later growth supports. In that sense, the two grants should not be assessed only as stand-alone financial instruments, but also as part of a broader early-stage development pathway. That interpretation is reinforced by survey comments. One respondent noted that the support **"helped us to test whether the idea was worth pursuing before spending more money"**, while another described the Priming Grant as **"giving us the breathing space to get the business properly up and running".**

Inputs, activities and outputs

As shown in Table A5, the two early-stage grant schemes have moved in different directions over the evaluation period. Priming Grant expenditure fell from **€5.4 million in 2015 to €4.5 million in 2025**, representing a decline of **16%**, while the number of businesses paid fell from **492 to 263**, a decline of **47%**. By contrast, Feasibility Grant expenditure increased from **€1.0 million to €1.9 million**, representing growth of **89%**, while businesses paid rose from **158 to 211**, an increase of **34%**. This suggests some rebalancing within the early-stage grant offer, with Feasibility becoming more prominent over time and Priming operating at lower volume than at the start of the evaluation period.

Table A 5 Priming Grant and Feasibility Grant: inputs and activity

Indicator	Priming Grant 2015	Priming Grant 2025	Change	Feasibility Grant 2015	Feasibility Grant 2025	Change
Expenditure (€m)	5.4	4.5	-16%	1.0	1.9	+89%
Businesses paid	492	263	-47%	158	211	+34%

Source: Enterprise Ireland monitoring data and evaluation synthesis.

The monitoring position for both schemes is relatively weak. As shown in **Table A6**, the main routine evidence is the **number of clients paid** and the **value of payments by year and LEO**. There is no routinely recorded support-specific output measure with a corresponding target, and no direct administrative indicator of whether supported businesses progressed, survived or grew. This is an important limitation because both grants are intended to influence business development at stages where effects may emerge over time rather than immediately. In practice, it means that administrative evidence is helpful on scale and change in activity, but much less useful in assessing whether the intended outputs were achieved.

Outcomes and impacts

The survey evidence suggests a positive pattern of outcomes for both schemes, though with different emphases. For **Priming Grant**, the strongest reported effects are on early business establishment and initial growth. As shown in **Table A7**, high shares of respondents reported that the support had **helped the business grow in its early stages (90.7%)**, **helped validate the business idea (80.2%)**, **enabled increased operational capacity (76.5%)**, and supported the **development of new products, services or processes (74.1%)**. On more conventional business performance measures, respondents also reported strong effects: **76%** reported increased productivity, **74%** increased sales turnover, **70%** increased profitability and **48%** said the support had enabled them to employ additional people.

The outcome picture for **Feasibility Grant** is somewhat different, and appropriately so. Its strongest reported effects relate to **testing, readiness and informed decision-making** rather than immediate commercial growth. As shown in **Table A8**, respondents most frequently reported improved **understanding of technical feasibility (83.0%)**, **commercial feasibility (82.4%)**, **nature of demand (81.5%)**, and **readiness for next-stage investment (81.9%)**. A substantial share also reported support for the **development of new products, services or processes (77.5%)**. On performance measures, reported effects are positive but somewhat less strong than for Priming: **63%** reported increased productivity, **61%** increased sales turnover, **54%** increased profitability and **32%** additional employment. This is consistent with the intended role of the support: Feasibility is more about de-risking and improving the quality of early-stage development decisions than generating immediate growth outcomes.

Stakeholder evidence supports this interpretation. Feedback from the consultation process/stakeholder engagement (1) described the LEOs as playing an important role for smaller firms and early-stage businesses, and distinguished this from Enterprise Ireland's later-stage growth focus. Their broader view of the LEO system as valuable because of its local accessibility, mentoring and support for firms at an earlier stage is directly relevant here. It suggests that the contribution of these grants lies partly in the fact that they reach businesses at a point where structured finance or specialist advice is otherwise limited. In that sense, the grants are not just small funding instruments, but part of a wider early-stage development offer.

Additionality and sustainability

The case for additionality appears reasonably strong for both schemes, though the mechanism differs between them. For **Priming Grant**, additionality appears to arise primarily through helping firms that face limited access to early-stage finance or structured support. For **Feasibility Grant**, additionality

appears to lie more in reducing uncertainty and improving decision quality before further investment is made. In both cases, the support is likely to matter most where firms are small, young or still testing viability and where mainstream alternatives are harder to access.

The survey evidence is broadly consistent with this. In the wider survey, many respondents said it would have been difficult to access similar support elsewhere, and the support-specific findings suggest benefits that are plausibly additional rather than simply substitutive. A survey respondent described the Feasibility Grant as **"making it possible to test the market properly before taking the plunge",** while another said the Priming Grant meant the business could **"actually move from idea to trading rather than staying on paper".** These comments are anecdotal, but they align closely with the intended logic of the two schemes.

There is also some evidence of sustainability, though again the pattern differs between schemes. For **Priming Grant**, the main sustainability issue is whether early gains in capability and operational capacity translate into continued survival and growth. The survey provides a useful progression indicator: **85.9%** of those asked reported that the business supported through Priming had gone ahead. For **Feasibility Grant**, sustainability is more about whether supported projects proceed into later development. Here too the picture is positive: **85.5%** of those asked reported that the project had gone ahead. These are not direct measures of long-term commercial success, but they do suggest that the grants are often associated with meaningful progression rather than with isolated or 'dead-end' activity. At the same time, the evidence base does not allow strong conclusions about longer-term survival, persistence or scale of later impacts.

Management, delivery and VfM

From a delivery perspective, the two grants illustrate both the strengths and limitations of the wider LEO model. Their main strength is that they provide relatively accessible early-stage support within a locally embedded system that businesses can approach before they are ready for more complex or specialist provision. This local accessibility appears especially important for smaller firms and would-be entrepreneurs. However, the main body report chapter on delivery also showed that **application processes for financial support are weaker rated than other aspects of the service**, and this is likely to be relevant here. For small firms seeking relatively modest early-stage support, application and compliance effort can feel disproportionately burdensome. Some survey respondents commented on this directly, calling for **"less paperwork at the earliest stage"** and **"quicker decisions when you are trying to get started".**

From a value for money perspective, the picture is positive but qualified. **Feasibility Grant** appears to offer plausible value where relatively modest support improves investment readiness and reduces poor-quality business decisions. **Priming Grant** appears to offer plausible value where support helps firms establish operations, build capacity and progress into trading and early growth. However, the absence of stronger support-specific monitoring means that value for money can only be judged at a broad level. The main value for money case rests on the schemes' apparent strategic fit, relatively contained expenditure, and positive evidence of progression and business-level benefit, rather than on precise quantified estimates of net impact.

Overall conclusion

Taken together, the evidence suggests that **Priming Grant and Feasibility Grant are strategically coherent and complementary early stage supports within the LEO supports**. Feasibility appears strongest in helping firms test ideas, assess demand and improve readiness for next-stage investment, while Priming is more strongly associated with early business establishment, operational capacity and initial growth. Both schemes appear to be contributing positively at the stages they are intended to support, and both show plausible additionality for firms that would otherwise struggle to access appropriate early-stage help.

The main weakness is not one of purpose but of evidence. For both schemes, administrative monitoring is much stronger on **payments and activity volume** than on **support-specific outputs, progression and**

longer-term outcomes. This limits the ability to assess comparative performance and value for money with high precision. On balance, however, the evidence supports a positive judgement: the two grants appear to be useful, likely additional and well aligned with the LEO role in supporting entrepreneurship and early-stage business development, even if the current monitoring framework understates their contribution.

Table A 6 Priming Grant and Feasibility Grant: monitoring position

Scheme	Main routine evidence available	Target linked output measure	Main limitation	Overall evidence strength
Priming Grant	Clients paid; value of payments by year and LEO	No	No routinely recorded output or target measure; administrative rather than performance data	Moderate
Feasibility Grant	Clients paid; value of payments by year and LEO	No	No routinely recorded output or target measure; administrative rather than performance data	Moderate

Source: Enterprise Ireland monitoring material and evaluation synthesis.

Table A 7 Priming Grant and Feasibility Grant: selected reported outcomes and wider benefits

Measure	Priming Grant	Feasibility Grant
Increased productivity*	76%	63%
Increased sales turnover*	74%	61%
Increased profitability*	70%	54%
Allowed the business to employ additional people*	48%	32%
Helped validate the business idea**	80.2%	n/a
Helped the business grow in its early stages**	90.7%	n/a
Enabled increased operational capacity**	76.5%	n/a
Developed new products, services or processes**	74.1%	77.5%
Improved understanding of technical feasibility**	n/a	83.0%
Improved understanding of commercial feasibility**	n/a	82.4%
Improved understanding of demand**	n/a	81.5%
Improved readiness for next-stage investment**	n/a	81.9%

** Percentage of valid yes/no responses excluding "Don't Know / Not Relevant".*
*** Percentage agreeing/strongly agreeing excluding "Don't Know / Not Relevant".*
Source: Analysis of LEO beneficiary survey data. Q3.3, Q3.4, Q3.5 and Q3.7

Table A 8 Priming Grant and Feasibility Grant: progression indicators

Indicator	Result
Priming-supported business went ahead	85.9%
Feasibility-supported project went ahead	85.5%

Source: Analysis of LEO beneficiary survey data. Q3.1 and Q3.6

A3 Digital adoption and optimisation: Digital for Business Scheme & Grow Digital Voucher

Introduction

This appendix provides a concise assessment of the **Digital for Business Scheme** and **Grow Digital Voucher**, which together form the core of the LEO supports' digital adoption offer. The two supports are closely linked in design and should be understood as a combined pathway: **Digital for Business** provides a structured diagnostic and action-planning exercise, while **Grow Digital Voucher** supports implementation of identified digital improvements. Taken together, they are intended to help small firms improve digital capability, business processes and competitiveness, while also supporting wider policy priorities around productivity and digital transition.

Scheme overview and strategic fit

The digital support offer is strategically coherent within the wider LEO supports because it addresses a clear and growing area of need for micro and small businesses. The **Grow Digital Voucher** is explicitly framed in the EVAC Handbook as supporting the **White Paper on Enterprise** priorities around digitalisation, productivity growth, wider market reach and the strengthening of locally trading businesses. It is intended for firms with between 1 and 50 employees and is linked directly to a completed **Digital for Business** project, which acts as the diagnostic gateway into implementation support. The voucher funds eligible digitalisation costs, including software, website development, and associated training or configuration support.

This positioning fits well with the wider role of the LEOs as a localised model of support for smaller firms that may need practical, structured support before they are ready to invest in more advanced systems or more specialised digital consultancy. It also aligns with the broader policy emphasis on helping smaller firms improve basic digital intensity and operational capability. In strategic terms, the combined offer appears to sit between general advisory support and capital investment, providing a relatively accessible route into digital change for firms that might otherwise under-invest or struggle to identify the most appropriate next step.

Inputs, activities and outputs

The two supports are relatively new compared with long-established parts of the LEO supports, and this affects both scale and evidence. As shown in Table A9, expenditure on Digital for Business increased from **€0.0 million in 2015 to €2.2 million in 2025**. Grow Digital Voucher also now appears in the financial time series, with expenditure of **€0.3 million in 2025**, reflecting the more recent introduction and early-stage development of the scheme. This means the two supports are still at different points of maturity within the administrative evidence base, with Digital for Business now operating at a larger scale and Grow Digital Voucher still at an earlier stage of rollout. In 2025, Digital for Business recorded **1,134 clients approved**, while Grow Digital Voucher recorded **106 clients approved**.

The output evidence is somewhat stronger than for some other supports because the routine framework includes **clients approved** for both **Digital for Business** and **Grow Digital Voucher**, and the evaluation material notes that these are among the better-covered newer schemes. However, these remain **uptake or approval measures rather than outputs achieved**, and therefore provide only a partial basis for performance assessment. As shown in **Table A10**, the evidence base for the combined digital offer is best described as **moderate**: stronger than for some long-established grants in terms of monitoring coverage, but still limited in what it can say about the effects achieved through support.

The beneficiary survey adds an important perspective on scale and reach. As shown in **Table A11**, **32.7%** of survey respondents reported receiving **Digital for Business / Grow Digital Voucher**, and **20.3%** identified it as one of the most important supports they had received. The survey also suggests that take-up is concentrated more strongly among more established businesses: reported receipt rises from **6.0%** among businesses not yet established to **44.9%** among mature firms aged 10 years or more. This

supports the interpretation that the digital offer is being used less as a pre-start intervention and more as a practical optimisation and modernisation support for established businesses.

Outcomes and impacts

The strongest evidence for this support area is on **digital adoption, process improvement and operational change** within beneficiary firms. As shown in **Table A12**, among respondents who had received **Digital for Business / Grow Digital Voucher**, **79.5%** reported improved understanding of digital opportunities, **78.6%** improved use of digital tools in operations, **72.5%** improved efficiency of business processes, **68.9%** enabled investment in new digital systems, and **67.2%** development of new products, services or processes. These are high reported rates and point to a support package that is doing more than raising awareness: it appears to be helping firms make practical changes in how they operate.

On broader business performance measures, the picture is also positive, though somewhat less strong than for schemes such as the Business Expansion Grant. Earlier programme-level analysis found that **Digital / Grow Digital** is associated with reported gains in productivity, sales turnover and profitability, but less strongly with employment and export sales. This pattern is consistent with the intended role of the support: it is more plausibly expected to improve efficiency, systems and capability than to generate immediate large-scale employment effects. In that sense, the support appears to contribute to business performance mainly through operational modernisation and improved digital capability rather than through direct growth alone.

Stakeholder evidence supports this interpretation. An external delivery partner for lean, digital and green supports described digital support as part of a broader pathway from **diagnosis to implementation**, often followed by Grow Digital and then green support where relevant. He also noted that digital supports tend to have more standardised outputs than some other parts of the programme, while arguing that current monitoring still focuses too heavily on counts of activity rather than substantive business change. This is a useful insight for interpreting the evidence: the scheme appears to be comparatively structured in delivery terms, but the monitoring framework still understates the extent of change occurring within firms. As one survey respondent put it, the support helped them **"identify exactly where digital improvements would make the most difference, and then actually put them in place".**

Additionality and sustainability

The case for additionality appears reasonably strong. The design of the offer itself implies a clear additionality rationale: it combines expert diagnosis with a relatively modest (although increased) implementation grant for firms that may not otherwise access structured digital support. The survey evidence suggests that a substantial share of businesses report changes that are plausibly additional, particularly in relation to digital understanding, systems investment and process improvement. This is consistent with the wider additionality findings in the main report, which suggest that many beneficiaries would have found comparable support difficult to access elsewhere. The added value of the support appears especially likely where firms need help to move from broad recognition of the need to digitalise towards a clearer plan and practical implementation.

The sustainability outlook is also relatively positive. Digital supports are the kind of intervention where benefits are often most durable when they result in **embedded changes in systems, tools and working practices**. The high shares reporting improved use of digital tools, investment in new systems and more efficient business processes suggest that at least some of the gains are likely to persist beyond the immediate support period. This aligns with the broader sustainability conclusion in Chapter 5 that the programme is most likely to generate durable effects where it helps firms embed new capabilities, processes or assets. At the same time, the evidence base does not allow strong conclusions about longer-term persistence or digital maturity progression beyond the initial post-support period.

Management, delivery and VfM

From a delivery perspective, the combined digital offer appears relatively well structured. The link between **Digital for Business** and **Grow Digital Voucher** gives the support a clearer logic than some other parts of the programme: firms first receive a diagnostic assessment, then draw on the voucher to implement selected changes. This sequencing is a strength in management terms because it reduces the risk of poorly targeted digital spending and creates a visible progression route, although some external delivery partners report that the business would in some cases be able to fund implementation without the voucher and some regard the requirement for spend on subscriptions to be too high, so that further refinements and consistency in delivery may be desirable. The EVAC Handbook also introduces a useful discipline by requiring the second voucher, where applicable, to be justified by demonstrable progress against the first Digital for Business report.

The main limitations are those seen elsewhere in the LEO system: administrative evidence remains stronger on approvals and uptake than on results, and the later introduction of Grow Digital means that the financial and outcome evidence base is still maturing. From a value for money perspective, the support appears plausible: it is relatively low cost in overall programme terms, strongly aligned with policy priorities, and associated with high reported rates of operational and digital improvement. However, the current evidence base does not permit precise estimates of cost-effectiveness or net additional impact. The most credible judgement is therefore that the digital offer appears likely to provide reasonable value for money, but that stronger follow-up data on implementation and progression would improve confidence in this conclusion.

Overall conclusion

Overall, the evidence suggests that **Digital for Business** and **Grow Digital Voucher** form a coherent and increasingly important part of the LEO supports. Their main contribution appears to be in helping businesses identify digital priorities, improve processes, invest in systems and modernise operations. The strongest reported effects are on digital adoption and operational improvement rather than on immediate employment growth, which is consistent with the intended role of the support.

The main weaknesses are evidential rather than strategic. The schemes are newer than many other supports, financial and outcome data are still developing, and the monitoring framework is stronger on approvals than on realised outputs and longer-term progression. Even so, the available survey and stakeholder evidence supports a positive judgement: the combined digital offer appears to be strategically well aligned, plausibly additional and likely to generate durable benefits where digital systems and practices become embedded within the business.

Table A 9 Digital for Business and Grow Digital Voucher: inputs and activity

Indicator	Digital for Business 2015	Digital for Business 2025	Change	Grow Digital Voucher 2015	Grow Digital Voucher 2025	Change
Expenditure (€m)	0.0	2.2	n/a	0.0	0.3	n/a
Clients approved	0	1,134	n/a	0	106	n/a
Interpretation	Not yet in operation	Established and operating at larger scale	—	Not yet in operation	Early-stage rollout now visible in financial and output data	—

Note: Grow Digital Voucher expenditure begins later than the financial series shown here.
Source: Enterprise Ireland monitoring data and evaluation synthesis.

Table A 10 Digital for Business and Grow Digital Voucher: monitoring position

Scheme	Main routine evidence available	Target linked output measure	Main limitation	Overall evidence strength
Digital for Business	Clients approved	Yes	Approval is an uptake/input measure rather than an output or outcome	Moderate
Grow Digital Voucher	Clients approved; clients paid	Yes, for approvals	Approval/payment data available, but limited direct evidence on outputs achieved	Moderate

Source: Enterprise Ireland monitoring material and evaluation synthesis.

Table A 11 Digital for Business / Grow Digital Voucher: survey evidence on reach

Measure	Result
Respondents reporting receipt of Digital / Grow Digital	32.7%
Respondents identifying Digital / Grow Digital as most important support	20.3%
Take-up among businesses not yet established	6.0%
Take-up among recent starts (0–2 years)	13.8%
Take-up among mature firms (10+ years)	44.9%

Source: Analysis of LEO beneficiary survey data. Q1.1, Q2.4 and Q2.6

Table A 12 Digital for Business / Grow Digital Voucher: reported outcomes and wider benefits

Measure	Result
Improved understanding of digital opportunities	79.5%
Improved use of digital tools in operations	78.6%
Improved efficiency of business processes	72.5%
Enabled investment in new digital systems	68.9%
Development of new products, services or processes	67.2%

Note: Percentage agreeing/strongly agreeing or reporting positive effect among valid responses.
Source: Analysis of LEO beneficiary survey data. Q3.12 and Q3.13

A4 Increasing resilience: Green for Business Scheme & Energy Efficiency Grant

Introduction

This appendix provides a concise assessment of the **Green for Business Scheme** and **Energy Efficiency Grant**, which together form the main environmental sustainability and resource-efficiency offer within the in-scope LEO supports. The two supports are closely linked in practice. **Green for Business** provides advisory and diagnostic support to help firms identify practical environmental improvements, while the **Energy Efficiency Grant** helps businesses invest in eligible measures, often following recommendations from Green for Business, Green Start or an SEAI energy audit. Taken together, they are intended to help smaller firms improve efficiency, reduce waste and energy use, and strengthen resilience in the face of rising input costs and growing environmental expectations.

Scheme overview and strategic fit

The combined green offer is strategically coherent within the wider LEO supports because it addresses a clear and growing policy priority around sustainability, competitiveness and business resilience. The EVAC Handbook describes the **Energy Efficiency Grant** as support for businesses to invest in **energy efficiency, sustainability and circular economy measures**, while **Green for Business** is framed as advisory support to help firms improve environmental performance and identify practical actions. This positioning aligns closely with the wider policy emphasis in the **White Paper on Enterprise 2022–2030** and the **LEO Policy Statement 2024–2030**, both of which place increasing weight on decarbonisation, resource efficiency and helping smaller firms adapt to structural change.

Strategically, these supports are less about immediate commercial growth than about helping firms modernise operations, reduce costs and improve longer-term resilience. This distinction is important when interpreting outcomes. A support focused on green transition should not necessarily be expected to produce the same short-term turnover or employment effects as an expansion grant. Its value often lies more in reducing cost pressures, embedding better practices and preparing firms for future regulatory and market conditions. That interpretation is reflected in survey comments. One respondent noted that the support **"opened our eyes to where we were wasting energy and money"**, while another said it helped the business **"be more sustainable in a practical way, not just in theory".**

Inputs, activities and outputs

These supports are relatively new within the programme, and this affects both their scale and the strength of the evidence. As shown in Table A13, expenditure on Green for Business rose from **€0.0 million in 2015 to €2.3 million in 2025**, while Energy Efficiency Grant expenditure rose from **€0.0 million to €5.2 million** over the same period. The administrative activity series also shows that, by 2025, there were **1,094 Green for Business clients approved,** and **641 Energy Efficiency Grant clients approved**. This indicates that the combined green offer has grown quickly from a standing start to become a significant part of the in-scope LEO supports, with Energy Efficiency Grant in particular now representing a materially larger expenditure line than in 2024. However, these remain approval or uptake measures rather than evidence of completed environmental changes, energy savings or emissions reductions.

The monitoring position is mixed. The framework includes **clients approved** for both **Green for Business** and **Energy Efficiency Grant**, which means these supports are among the better-covered newer schemes in terms of routine activity data. However, these remain approval or uptake measures, not outputs or outcomes achieved. As shown in **Table A14**, the evidence base is best described as **moderate**: stronger than for some older supports in terms of activity tracking, but still limited in what it can show about realised business effects.

The beneficiary survey adds an important dimension on reach. As shown in **Table A15**, **13.6%** of survey respondents reported receiving **Green for Business / Energy Efficiency Grant**, and **7.8%** identified it as

one of the most important supports they had received. Compared with some other supports, this suggests a more targeted and lower-volume scheme, which is consistent with its more recent introduction and narrower purpose. The lower share identifying it as most important is not necessarily a weakness: it may reflect the fact that green and energy measures are often one part of a wider support journey rather than the single dominant intervention in a business's development.

Outcomes and impacts

The strongest evidence for these supports is on **efficiency, environmental practices and resilience**, rather than on conventional growth metrics. As shown in **Table A16**, respondents who had received **Green for Business / Energy Efficiency Grant** reported very high levels of agreement that the support had:

- Improved understanding of **energy and carbon impacts** (**93.4%**)
- Identified **cost-saving opportunities** (**93.5%**)
- Supported investment in **energy-efficient measures** (**89.9%**)
- Improved **environmental practices** (**90.3%**)
- Reduced **carbon footprint** (**88.7%**)

These are strong findings and are closely aligned with the intended logic of the support. They suggest that the combined offer is generating practical business change rather than simply raising awareness.

On broader business performance measures, the pattern is more modest, which is unsurprising. In the wider survey analysis, **Green / Energy** support was associated with weaker effects on sales and employment than supports such as Business Expansion or Priming, but still showed a positive pattern in areas such as **profitability**, **efficiency** and **resilience**. This supports the interpretation that the main contribution of the support is not immediate business growth, but strengthening the efficiency and robustness of the business model. In that sense, the supports appear to contribute to productivity and resilience indirectly, through lower costs, improved processes and more sustainable operating practices.

Stakeholder evidence is consistent with this interpretation. An external delivery partner for lean, digital and green supports described green support as part of a broader support pathway, often sitting alongside lean and digital interventions and helping firms identify practical operational improvements, particularly valuable for hospitality, tourism and retail businesses where cost savings can make a very tangible difference to operational viability. Their wider point that current metrics capture activity counts better than substantive business change is especially relevant here: much of the value of Green for Business and the Energy Efficiency Grant lies in embedded changes in practice that are not well reflected in headline monitoring measures. This helps explain why the survey evidence is more informative than the administrative data in understanding their contribution.

Additionality and sustainability

The case for additionality appears reasonably strong. The support is targeted at a type of change that many smaller firms may be aware of in principle, but may struggle to prioritise, diagnose or finance in practice. The advisory element of **Green for Business** helps identify and structure actions that might otherwise remain vague or deferred, while the **Energy Efficiency Grant** helps businesses move from intention to implementation. In this sense, the support is likely to be additional not only because some firms may not otherwise invest, but also because the support may improve the timing, quality and scope of action taken. The findings on additionality are positive, especially given that whilst other forms of energy efficiency support may be available from other sources, those benefiting from LEO supports would not have been the ones typically accessing alternative help.

The sustainability case is stronger here than for some other supports. These are the kinds of interventions where benefits are most likely to endure when they are embedded in systems, equipment

or day-to-day business practice. The high reported rates of improved environmental practice, investment in energy-efficient measures and reduced carbon footprint all point towards changes that may continue to generate benefits over time. As one respondent put it, the support **"helped us make changes that will keep saving money year after year".** Another said that **"it gave us a clear action plan and the confidence to act on it".** These comments align closely with the wider sustainability findings in Chapter 5 of the main body report, which suggested that the programme is most likely to generate durable benefits where it helps firms embed new behaviours, systems or assets.

Management, delivery and VfM

From a delivery perspective, the combined green offer appears relatively well designed. The link between advisory diagnosis and potential follow-on investment gives the support a clear logic and reduces the risk of poorly targeted spending. It also fits well with the wider LEO model, in which firms can move from advice and planning into practical implementation. The main limitations are those seen elsewhere in the programme: the supports are newer, their evidence base is still maturing, and administrative measures remain stronger on approvals and activity volume than on realised outputs and outcomes.

From a value for money perspective, the picture is positive but qualified. These supports account for a relatively modest share of total LEO expenditure, but survey evidence suggests strong reported benefits in areas directly aligned to their intended purpose. In simple terms, they appear to be delivering relevant changes at relatively low programme cost. However, the evidence base is not yet strong enough to support precise estimates of cost-effectiveness or net environmental benefit. The most credible judgement is therefore that the combined green offer appears likely to provide reasonable value for money, particularly where it supports embedded cost-saving and resilience benefits, but that stronger follow-up evidence on realised savings and persistence would improve confidence in this conclusion.

Overall conclusion

Overall, the evidence suggests that **Green for Business** and the **Energy Efficiency Grant** form a coherent and increasingly important part of the LEO supports. Their main contribution appears to be in helping businesses identify and implement practical environmental and energy-efficiency improvements, with the strongest reported effects on awareness, cost-saving opportunities, environmental practices and resilience. This is strategically well aligned with current national policy priorities and with the LEO role in helping smaller firms adapt to changing business conditions.

The main weakness is evidential rather than conceptual. The supports are newer than many other parts of the programme, and the monitoring system remains stronger on uptake and approvals than on realised outputs, cost savings or longer-term environmental outcomes. Even so, the available survey and stakeholder evidence supports a positive judgement: the combined green offer appears to be strategically well aligned, plausibly additional and likely to generate relatively durable benefits where changes are embedded in equipment, systems or business practice.

Table A 13 Green for Business and Energy Efficiency Grant: inputs and activity

Indicator	Green for Business 2015	Green for Business 2025	Change	Energy Efficiency Grant 2015	Energy Efficiency Grant 2025	Change
Expenditure (€m)	0.0	2.3	n/a	0.0	5.2	n/a
Clients approved	0	1,094	n/a	0	641	n/a

Note: Both supports were introduced later in the evaluation period.
Source: Enterprise Ireland monitoring data and evaluation synthesis.

Table A 14 Green for Business and Energy Efficiency Grant: monitoring position

Scheme	Main routine evidence available	Target linked output measure	Main limitation	Overall evidence strength
Green for Business	Clients approved; participant volumes	Yes	Approval/participation measures are closer to uptake than to outputs or outcomes	Moderate
Energy Efficiency Grant	Clients approved; clients paid	Yes, for approvals	Administrative data are available, but limited direct evidence on realised business effects	Moderate

Source: Enterprise Ireland monitoring material and evaluation synthesis.

Table A 15 Green for Business / Energy Efficiency Grant: survey evidence on reach

Measure	Result
Respondents reporting receipt of Green / Energy support	13.6%
Respondents identifying Green / Energy as most important support	7.8%

Source: Analysis of LEO beneficiary survey data. Q1.1, Q2.4 and Q2.6

Table A 16 Green for Business / Energy Efficiency Grant: reported outcomes and wider benefits

Measure	Result
Improved understanding of energy / carbon impacts	93.4%
Identified cost-saving opportunities	93.5%
Supported investment in energy-efficient measures	89.9%
Improved environmental practices	90.3%
Reduced carbon footprint	88.7%

Note: Percentage agreeing/strongly agreeing among valid responses.
Source: Analysis of LEO beneficiary survey data. Q3.14 and Q3.15

A5 Enhancing capability: Mentoring & Training, networking and management development

Introduction

This appendix provides a concise assessment of the **Mentor Programme** and **Training, Networking and Management Development Support** within the LEO supports. These supports are considered together because they form the core of the LEO system's **capability-building offer**. Unlike the grant schemes, their main purpose is not to fund a specific investment, but to strengthen the knowledge, judgement, confidence, networks and management capability of business owners and managers. In practice, they are among the most visible and high-volume parts of the LEO supports and often act as accessible entry points into wider support pathways.

Scheme overview and strategic fit

Both supports are strategically central to the LEO model. The **Mentor Programme** provides tailored one-to-one developmental support, while **Training, Networking and Management Development** provides a broader mix of workshops, peer learning, management development and networking activity. Together, they align closely with the wider policy role of the LEOs as a **locally delivered entry point** for micro and small businesses, and with national policy priorities around entrepreneurship, management capability, business resilience and productivity improvement. In contrast to some more targeted schemes, these supports are intended to be broadly accessible and to help firms at different stages of development strengthen the underlying capabilities needed for growth, adaptation and resilience.

This strategic fit is reinforced by stakeholder evidence. Feedback from the consultation process/stakeholder engagement described mentoring as one of the most valued elements of the LEO offer and emphasised the importance of local advice and relationship-based support for smaller firms. This is consistent with the wider role of the LEO system in helping firms that may not yet be ready for more specialist or nationally oriented provision. A survey respondent captured this well, commenting that **"the mentoring helped me step back and make better decisions rather than just react day to day".** Another noted that the training support provided **"practical information I could actually use in the business straight away".** These comments align closely with the intended logic of the two supports: they are designed to build capability that can later translate into stronger business performance.

Inputs, activities and outputs

As shown in Table A17, both supports are substantial in scale and have grown strongly over the evaluation period. Mentoring expenditure increased from **€1.8 million in 2015 to €3.2 million in 2025**, representing growth of around **77%**, while mentoring participants increased from **8,175 to 16,628**, representing growth of **103%**. This indicates that mentoring has expanded substantially while remaining relatively low-cost per participant.

Training, Networking and Management Development expenditure rose from **€4.4 million in 2015 to €6.9 million in 2025**, representing growth of around 58**%.** Over the same period, participants increased from **27,185 to 44,209**, representing growth of **63%.** This confirms that training and related supports remain one of the largest-volume parts of the in-scope LEO supports. Overall, the data show that both mentoring and training/networking/management development have grown markedly since 2015, but with mentoring showing stronger growth in participant volume relative to expenditure.

Table A 17 Mentor Programme and Training, Networking and Management Development: inputs and activity

Indicator	Mentoring 2015	Mentoring 2025	Change	Training, Networking and Management Development 2015	Training, Networking and Management Development 2025	Change
Expenditure (€m)	1.8	3.2	+77%	4.4	6.9	+58%
Participants	8,175	16,628	+103%	27,185	44,209	+63%

Source: Enterprise Ireland monitoring data and evaluation synthesis.

The monitoring position is stronger here than for several of the grant schemes. As shown in **Table A18**, both supports have routine participant measures and target-bearing metrics within the wider LEO performance framework. However, these measures still have important limitations. **Mentoring participants** count businesses receiving a block of mentoring, not the intensity or quality of the support, while **training participants** are not unique businesses and therefore may overstate reach where firms attend multiple events. The monitoring framework is therefore useful for showing scale and growth in delivery, but much less useful for assessing the quality or depth of capability change achieved.

The beneficiary survey confirms that both supports are prominent within the user experience of the LEO system. As shown in **Table A19**, **48.2%** of respondents reported having received **Mentoring**, making it the single most commonly reported in-scope support, while **28.9%** reported receiving **Training, Networking and Management Development**. They also rank highly in perceived importance: **28.6%** of respondents identified Mentoring as one of the most important supports they had received, and **17.7%** did so for Training, Networking and Management Development. This suggests that these supports are not only high-volume, but also central to the perceived value of the LEO offer.

Outcomes and impacts

The strongest evidence for these supports lies in the area of **capability-building**, and this is also where their contribution appears clearest. Among respondents who had received **Mentoring**, very high shares agreed that it had improved the **quality of business decision-making (89.6%)**, **confidence in addressing business challenges (86.6%)**, and **strategic direction (84.4%)**. High proportions also reported improved **management capability (79.1%)**, increased confidence in using external support (**80.4%**) and greater **resilience (76.2%)**. As shown in **Table A20**, the pattern for **Training, Networking and Management Development** is similarly strong: **95.3%** reported improved **business knowledge and skills**, **82.5%** improved **management capability**, **80.8%** enhanced **knowledge of external support**, **80.8%** stronger **business networks and contacts**, and **76.0%** increased **resilience**.

These are primarily **softer and enabling outcomes**, but they are not minor or incidental. For many micro and small businesses, they are likely to be the mechanisms through which later commercial outcomes are generated. The wider survey evidence reinforces this interpretation. Across the LEO supports as a whole, respondents most frequently reported gains in **business knowledge and skills**, **management capability**, **networks and contacts**, **operational capacity** and **resilience**. The evidence therefore suggests that these supports contribute not simply through one-off advice or event attendance, but by helping firms become more capable, informed and confident over time. As one survey respondent put it, **"mentoring gave me confidence to tackle issues I had been putting off for months".** Another commented that the training sessions were **"useful because they were practical, local and relevant to the size of business I run".**

Stakeholder evidence is strongly consistent with this picture. Feedback from the consultation process/stakeholder engagement described mentoring as one of the most valued parts of the LEO offer. A senior local LEO stakeholder also highlighted mentoring as a strong support, but warned that delivery

pressures can create a risk of **"quantity over quality"** if the focus falls too heavily on numbers rather than the depth of support provided. This is a useful caution for interpretation. It suggests that the strengths of these supports lie not simply in their scale, but in the quality, continuity and practical relevance of what is delivered. In that sense, the high participant volumes should be seen as a strength only if they are accompanied by a consistent standard of delivery.

Additionality and sustainability

The case for additionality appears reasonably strong. Capability and management supports are the types of intervention that many micro and small firms may be least likely to secure in a structured way without public support, particularly where they require trusted external input, time away from day-to-day pressures, or access to peer learning and networks. The wider survey evidence showed that many beneficiaries would have found it difficult to access similar support elsewhere, and this is particularly plausible for mentoring and management development. Their added value is likely to lie less in direct financial substitution and more in providing support that businesses would otherwise defer, under-prioritise or purchase only imperfectly.

The sustainability case is also relatively positive. These are precisely the kinds of supports where benefits are most likely to persist when they change **management behaviour, decision-making, confidence, networks or business practice**. The high reported rates of improved strategic direction, decision-making, management capability and resilience suggest that at least some of the effects are likely to endure beyond the period of active support. This aligns with the main report's wider conclusion that the LEO supports are most likely to generate durable effects where it helps firms embed new capabilities or ways of working. A survey respondent expressed this succinctly: **"the course itself ended, but the changes in how I manage the business have stayed".**

Management, delivery and VfM

From a delivery perspective, these supports exemplify many of the strengths of the wider LEO model. They are relatively accessible, locally delivered, and often viewed positively by beneficiaries. They also appear to be important as both stand-alone supports and entry points into the wider LEO supports. The earlier delivery chapter showed that overall service quality is rated highly, particularly on professionalism, accessibility and responsiveness, and this is likely to be especially relevant to supports such as mentoring and training where user experience is central to impact. At the same time, the risks noted by stakeholders — variability in quality, strain on mentor panels, and pressure towards throughput rather than depth — as well as the issue of low mentor rates which risks diminishing quality, are important management considerations.

From a value for money perspective, the picture is positive but qualified. These supports account for a significant share of in-scope expenditure, but they also operate at substantial scale and appear to generate strong reported benefits in areas closely aligned to their intended purpose. Their value for money case is therefore likely to rest less on immediate headline commercial gains and more on the quality and durability of the capability improvements they generate. On the available evidence, they appear likely to offer reasonable value for money, particularly given their broad reach and strong alignment with the LEO model. However, the absence of stronger routine measures on quality, progression and durability means that this judgement remains indicative rather than precisely quantified.

Overall conclusion

Overall, the evidence suggests that **Mentoring** and **Training, Networking and Management Development** are among the most strategically important and evidently effective parts of the LEO supports. They operate at substantial scale, are highly visible to beneficiaries, and generate some of the strongest reported benefits in the survey evidence, particularly in relation to business knowledge, management capability, confidence, strategic direction and resilience. These supports appear to be central not only to the direct value of the LEO offer, but also to its wider role as a relationship-based support system for small businesses.

The main weaknesses are again evidential and managerial rather than strategic. The administrative framework is stronger on participant counts than on quality or outcome depth, and stakeholder evidence suggests that delivery quality can come under pressure where systems prioritise volume. Even so, the balance of evidence is clearly positive. These supports appear to be well aligned with the needs of the LEO client base, plausibly additional, and likely to generate relatively durable benefits where learning, networks and management practices are embedded over time.

Table A 18 Mentoring and Training, Networking and Management Development: monitoring position

Scheme	Main routine evidence available	Target linked metric	Main limitation	Overall evidence strength
Mentoring	Mentoring participants	Yes	Measures participant volume rather than quality, intensity or outcomes achieved	Moderate
Training, Networking and Management Development	Training participants	Yes	Participants are not unique businesses and do not show outcomes achieved	Moderate

Source: Enterprise Ireland monitoring material and evaluation synthesis.

Table A 19 Mentoring and Training, Networking and Management Development: survey evidence on reach

Measure	Mentoring	Training, Networking and Management Development
Respondents reporting receipt of support	48.2%	28.9%
Respondents identifying support as most important	28.6%	17.7%

Source: Analysis of LEO beneficiary survey data. Q1.1, Q2.4 and Q2.6

Table A 20 Mentoring and Training, Networking and Management Development: selected reported benefits

Benefit	Mentoring	Training, Networking and Management Development
Improved quality of business decision-making	89.6%	n/a
Increased confidence in addressing business challenges	86.6%	n/a
Improved strategic direction	84.4%	n/a
Improved management capability	79.1%	82.5%
Improved business knowledge and skills	n/a	95.3%
Enhanced knowledge of external support available	80.4%*	80.8%
Enhanced business networks and contacts	n/a	80.8%
Increased resilience to cope with internal and external changes	76.2%	76.0%

** For mentoring, the closest survey measure is increased confidence in the use of external support.*
Note: Percentages are based on valid responses excluding "Don't Know / Not Relevant".
Source: Analysis of LEO beneficiary survey data. Q3.17 and Q3.19

A6 Expansion: Business Expansion Grant

Introduction

This appendix provides a concise assessment of the **Business Expansion Grant**, which is the principal in-scope support aimed at helping firms move beyond start-up and into a more developed growth phase. Compared with the earlier-stage grants, it is more clearly oriented towards business expansion, increased operational capacity and commercial growth. The available evidence suggests that it is one of the strongest-performing supports in the in-scope LEO supports in terms of reported business outcomes, though the administrative evidence base remains stronger on spend and activity than on robust support-specific outputs.

Scheme overview and strategic fit

The Business Expansion Grant is designed to support firms that are beyond the initial establishment phase and seeking to expand business activity. In strategic terms, it occupies an important position within the wider LEO supports because it provides a bridge between early-stage support and later business growth. It is therefore well aligned with the role of the LEOs in supporting micro and small firms at different stages of development, including those with the potential to scale further over time. This role is also consistent with the wider enterprise policy emphasis on productivity, competitiveness and strengthening the growth potential of smaller firms.

The logic of the scheme is reflected in stakeholder and beneficiary evidence. Earlier consultation material suggests that the LEO system is valued not only for supporting start-up firms, but also for helping businesses build capacity and move to the next stage of development. Survey comments point in the same direction. One respondent described the support as **"the push we needed to move from surviving to actually expanding"**, while another said it **"allowed us to invest earlier than we otherwise could have".** These comments are consistent with the intended role of the grant as an enabler of expansion rather than a purely stabilising support.

Inputs, activities and outputs

As shown in Table A21, the Business Expansion Grant has grown substantially over the evaluation period. Expenditure rose from **€4.2 million in 2015 to €9.4 million in 2025**, representing growth of around **126%**, while the number of businesses paid increased from **319 to 488**, representing growth of **53%**. In 2025, it accounted for approximately **14.6% of total LEO expenditure**, indicating its continued prominence within the LEO support portfolio and its role as one of the larger direct financial supports.

Despite this scale, the monitoring position remains relatively weak. As shown in **Table A22**, the main routine administrative evidence is the **number of clients paid** and the **value of payments by year and by LEO**. There is no support-specific target-linked output measure in the routine framework, and no standard indicator that directly tracks whether the expansion activity funded was completed or what subsequent business changes resulted. This means that the administrative data are useful for showing scale, reach and change over time, but not for demonstrating performance in a fuller sense.

The beneficiary survey suggests that, while the scheme is lower volume than mentoring or digital support, it is highly salient to those who use it. As shown in **Table A23**, **21.1%** of survey respondents reported receiving the Business Expansion Grant, while **18.4%** identified it as one of the most important supports they had received. This is a notably high "most important" share relative to its level of take-up, which suggests that the scheme is often perceived as having substantial value among beneficiaries.

Outcomes and impacts

The Business Expansion Grant shows the clearest reported association with more immediate commercial outcomes of any in-scope support. As shown in **Table A24**, among valid survey responses **86%** reported increased productivity, **83%** increased sales turnover, **77%** increased profitability and **61%** said the support had enabled them to employ additional people. These are stronger business performance effects than for most other supports in the programme and are consistent with the

intended role of the grant in supporting growth and expansion rather than early-stage capability or diagnostic work.

The wider benefit evidence is similarly strong. Among valid responses, **92.0%** reported that the support had **enabled increased operational capacity**, **79.4%** that it had **encouraged additional investment in the business**, and **81.4%** that it had **increased resilience to cope with internal and external changes**. This suggests that the scheme contributes not only to immediate performance but also to strengthening firms' operating base and ability to grow. In evaluative terms, this is important because it indicates that the support is associated with both harder commercial effects and the enabling conditions for continued development.

The broader programme evidence reinforces this picture. In Chapter 5 of the main body report, the Business Expansion Grant stood out as the support with the strongest reported outcome pattern across productivity, turnover, profitability and employment. This suggests that, within the in-scope LEO supports, it is one of the clearest cases where a grant support is associated with business-level growth effects in a relatively direct way. A survey respondent captured this clearly: **"This grant let us make the jump to the next level rather than waiting another year or two".**

Additionality and sustainability

The case for additionality appears relatively strong. The Business Expansion Grant is intended to support firms that are ready to invest and expand, but which may do so more slowly, at smaller scale, or with greater risk in the absence of support. The reported outcome pattern is consistent with this. The survey evidence suggests that the support is associated with accelerated investment, stronger capacity and increased employment, and the wider additionality findings in the main report Chapter 5 suggest that many beneficiaries would have found similar support difficult to access elsewhere. This does not prove that all observed effects are wholly attributable to the grant, but it supports the judgement that the scheme is likely to have made a real difference to timing, scale or confidence of expansion activity for a substantial share of users.

The sustainability outlook is also relatively positive. The support is linked strongly to increased operational capacity, investment and resilience, all of which are the kinds of changes most likely to endure where they involve equipment, systems, staff or embedded business growth. Chapter 5 also found that Business Expansion Grant beneficiaries reported some of the strongest resilience effects in the LEO supports. As one respondent put it, **"The investment has changed what we can do permanently, not just for a few months".** This points to a support that is not only associated with short-term uplift, but with the creation of capacity that may continue to generate benefits over time.

Management, delivery and VfM

From a delivery perspective, the Business Expansion Grant benefits from being a relatively clear and tangible offer: businesses are generally able to identify the investment or capacity-building activity they want to pursue, and the support has a more visible link to commercial development than some of the softer supports. At the same time, the wider delivery chapter suggests that application and compliance requirements for financial supports can be a source of friction. This is likely to be relevant here too, particularly where firms are seeking relatively modest support but still face substantial paperwork or reporting requirements. That said, the survey evidence suggests that, despite these frictions, the support is often regarded as highly valuable once accessed.

From a value for money perspective, the scheme appears strong relative to much of the in-scope LEO supports. It represents a significant share of in-scope expenditure, but it is also associated with the clearest reported business performance effects and strong evidence of operational and investment-related gains. The absence of stronger routine outcome monitoring means that value for money cannot be quantified precisely, but the balance of evidence suggests that this is one of the supports where the case for good value for money is strongest, particularly if the reported gains in productivity, turnover, employment and resilience are even partly additional.

Overall conclusion

Overall, the evidence suggests that the **Business Expansion Grant** is one of the strongest-performing supports in the in-scope LEO supports. It is strategically well aligned with the LEO role in supporting firms beyond the earliest stage of development, operates at meaningful scale, and shows the clearest reported association with productivity, turnover, profitability, employment and operational expansion. It also appears to generate plausible additionality by enabling firms to invest or expand sooner, more effectively or at greater scale than they otherwise would have done.

The main limitation is evidential rather than substantive. The administrative framework remains stronger on **payments and spend** than on **support-specific outputs and outcomes**, which constrains the ability to demonstrate performance through routine monitoring alone. Even so, the combined survey, stakeholder and documentary evidence supports a positive overall judgement: the Business Expansion Grant appears to be a strategically important, likely additional and relatively high-value support within the LEO supports.

Table A 21 Business Expansion Grant: inputs and activity

Indicator	2015	2025	Change
Expenditure (€m)	4.2	9.4	+126%
Businesses paid	319	488	+53%
Share of total LEO spend in 2025	—	14.6%	—

Source: Enterprise Ireland monitoring data and evaluation synthesis.

Table A 22 Business Expansion Grant: monitoring position

Dimension	Position
Main routine evidence available	Clients paid; value of payments by year and LEO
LEO-level output in isolation	Administrative activity only
Target-linked metric	No
Main limitation	No routinely recorded output or target measure; administrative rather than performance data
Overall evidence strength	Moderate

Source: Enterprise Ireland monitoring material and evaluation synthesis.

Table A 23 Business Expansion Grant: survey evidence on reach

Measure	Result
Respondents reporting receipt of Business Expansion Grant	21.1%
Respondents identifying Business Expansion Grant as most important support	18.4%

Source: Analysis of LEO beneficiary survey data. Q1.1, Q2.4 and Q2.6

Table A 24 Business Expansion Grant: reported outcomes and wider benefits

Measure	Result
Increased productivity*	86%
Increased sales turnover*	83%
Increased profitability*	77%
Allowed the business to employ additional people*	61%
Enabled increased operational capacity**	92.0%
Encouraged additional investment in the business**	79.4%
Increased resilience to cope with internal and external changes**	81.4%

** Percentage of valid yes/no responses excluding "Don't Know / Not Relevant".*
*** Percentage agreeing/strongly agreeing excluding "Don't Know / Not Relevant".*
Source: Analysis of LEO beneficiary survey data. Q3.20 and Q3.21

A7 Stakeholders consulted

The evaluation included **20 stakeholder consultations**, covering national policy, programme oversight, LEO delivery, technical delivery partners and wider system stakeholders. Consultees were selected purposively to provide coverage across the main elements of the LEO support system, rather than to form a statistically representative sample.

Stakeholder group	Number consulted	Range of perspectives covered
National policy, governance and system oversight stakeholders	6	Strategic intent, policy alignment, national oversight, funding, governance, performance management, LEO–Enterprise Ireland interface, and wider enterprise support coherence
Enterprise Ireland regional / LEO interface stakeholders	2	Regional delivery perspective, LEO–Enterprise Ireland progression pathways, referral processes, scaling/export potential and regional variation
LEO leadership and local delivery stakeholders	5	Heads of Enterprise / LEO managers across a mix of urban, rural and regional contexts, covering delivery reality, local flexibility, resourcing, consistency, client engagement and implementation challenges
Programme delivery and technical specialists	4	Delivery partner perspectives across areas including lean/business process improvement, export support, digital, green and advisory support
Business advisory / enterprise development practitioner perspectives	2	Operational delivery, adviser/client interaction, grant and non-financial support processes, and practical delivery challenges
Wider local authority, regional or business representative perspectives	1	Local governance context, regional alignment and the role of LEOs within wider local economic development
Total	**20**	

An additional focus group was held with Heads of Enterprise, and the evaluation team benefitted from discussion with attendees of the County and City management Association (CCMA) Economic Development Committee.

Note: The consultation programme covered national policy and oversight, Enterprise Ireland interface and regional roles, LEO leadership, delivery partners, advisers and wider local/regional stakeholders. Consultees included stakeholders with knowledge of both grant-based and non-financial supports, and of both established supports and newer digital and green interventions. Findings from the consultations are reported thematically and anonymously throughout the report.

A8 Survey questionnaire

A copy of the survey questionnaire is available from the following link:

https://acrobat.adobe.com/id/urn:aaid:sc:us:e866d506-4c25-46b0-8bb4-311836081c3a

A9 Case studies

Purpose and interpretation of the case studies

This appendix presents illustrative case studies of businesses that have accessed Local Enterprise Office supports. The purpose is to show how LEO supports are experienced by different types of businesses at different stages of development, and how financial, advisory, digital, green and capability-building supports can combine over time.

The case studies are not statistically representative of all LEO-supported businesses and should not be interpreted as independently verified evidence of impact. Reported turnover, employment and counterfactual estimates are based on information provided by the businesses and have not been independently validated. The case studies should therefore be read as qualitative contribution evidence. They illustrate plausible pathways through which LEO supports may have helped businesses to start, invest, adapt, improve capability, increase resilience or grow.

The cases have been organised by broad business stage:

1. **Recent start and early-stage businesses**
2. **Early growth and testing businesses**
3. **Established growth and expansion businesses**
4. **Mature and resilience-focused businesses**

This structure reflects the wider finding that the LEO model is not simply a set of individual schemes. Businesses often engage with the LEO network as their needs evolve, drawing on different supports at different points in their development. The case studies are included as a standalone appendix so that they can be reviewed, shortened, anonymised or omitted if confidentiality considerations require it. Publication of named cases should be subject to confirmation that the businesses are content for the information, including any turnover, employment or quotations, to be included in the final report.

Summary of case studies by business stage

Business stage	Business	LEO area	Main supports referenced	Main reported effects	Core learning point
Recent start / early stage	Red Rooster Coffee	Westmeath	SYOB; Priming Grant; Digital for Business / Grow Digital Voucher; training and networking	Turnover reportedly c.15% higher than without support; 2 jobs sustained	Early-stage LEO support can help validate business ideas, support investment and sustain local employment
Recent start / early stage	SPUD Bespoke	Wicklow	Mentoring; Business Expansion Grant; Digital for Business / Grow Digital; Green for Business / Energy Efficiency Grant	Turnover reportedly increased to €260,000; employment from 1 to 2 staff	Mentoring and financial support can help new firms clarify strategy and move towards growth
Early growth / testing	Nova Human Capital Management	Sligo	Priming Grant; Business Expansion Grant; Digital for Business / Grow Digital Voucher	Employment reportedly increased from 1 to 2 full-time equivalent (FTE); turnover c.€300,000	Financial and digital support can help early-stage service businesses build capacity and market presence
Established growth / expansion	DEM Bottling Solutions	Mayo	Priming Grant; Business Expansion Grant; mentoring; training	Employment reportedly increased from 4 to 7 FTE; turnover c.€500,000	Grant support can de-risk investment and help businesses take on larger contracts

Established growth / expansion	Cushenden Woollen Mill	Kilkenny	Business Expansion Grant; Digital for Business / Grow Digital Voucher; Green for Business; mentoring / advisory support	Turnover reportedly increased from c.€600,000 to c.€800,000; employment from 6 to 9 FTE	Combined financial, digital and advisory support can help established firms manage growth and modernise processes
Established growth / expansion	Stainless Quality Fabrication Specialists	Limerick	SYOB; mentoring; Priming Grant; Business Expansion Grant	Turnover reportedly €2.3m compared with estimated €1.5m without support; employment from 10 to 19 staff	Early-stage LEO support can contribute to firms developing into larger, export-ready businesses
Mature / resilience-focused	CICS Silo Clean Ltd	Cavan	Digital for Business; Grow Digital Voucher	Streamlined business process; employment reportedly 33 rather than estimated 28 without support	Digital support can generate process efficiencies in established firms and free management time
Mature / resilience-focused	Manna Organics	Kerry	SYOB; mentoring; training; Digital for Business / Grow Digital Voucher	Turnover reportedly €561,000 compared with estimated €400,000 without support; employment from 3–4 to 8 staff	Long-term local support can help small firms build capability across changing business needs
Mature / resilience-focused	Baking Emporium Ltd	Cork North & West	Business Expansion Grant; Green for Business / Energy Efficiency Grant	Turnover reportedly €500,000 compared with estimated €480,000 without support; improved cost awareness and profitability	Green and energy supports can help traditional businesses identify cost-saving and resilience measures
Mature / resilience-focused	The Transcription Shop Ltd	Dublin Fingal	Mentor Programme; training, networking and management development support	Turnover reportedly maintained at c.€150,000 rather than falling to an estimated €120,000; employment maintained at 7 rather than falling to an estimated 5 staff	Mentoring and training can help mature firms respond to technology-led disruption and reposition their business model

RECENT START AND EARLY-STAGE BUSINESSES

Case study 1: Red Rooster Coffee – start-up, priming and early growth support

Business context

Red Rooster Coffee is a small Irish coffee roastery in the Westmeath LEO area. It is a family business with two staff, producing and selling a range of coffees online and through other channels. The business is a recent start-up and provides an example of how LEO support can assist small firms at the early validation and investment stage.

Supports used

- Start Your Own Business Programme.
- Priming Grant.
- Digital for Business / Grow Digital Voucher.
- Training, networking and management development support.

Reported effects

Hard outcomes reported by the business included:

- Turnover estimated to be around €30,000 higher than it would otherwise have been.
- Turnover reportedly increasing from c.€200,000 to c.€230,000.
- Two jobs sustained.

Softer or enabling outcomes included:

- Validation of the business idea.
- Increased business investment.
- Improved sales and productivity.
- Improved business knowledge and capability.

Contribution / additionality

The business identified the Priming Grant and training support as particularly valuable. It described the Priming Grant as essential to the business, with the application advice also seen as important. Similar support was described as difficult to access elsewhere, indicating high perceived additionality, although the figures are self-reported and not independently verified.

Learning points

- LEO support can be important in early-stage validation and investment decisions.
- Priming Grants may help unlock follow-on investment by giving small firms confidence to proceed.
- Advisory, training and local accessibility appear central to the perceived value of support.

Case study 2: SPUD Bespoke – early-stage mentoring and expansion support

Business context

SPUD Bespoke, the trading name of OWS Experiences Ltd, is a recent-start tourism and experience business based in Wicklow. It provides tailored, culturally rooted experiences for visitors, corporate clients and other customers. As a new business, it required support across brand development, customer segmentation, marketing, website development, social media and back-office operations.

Supports used

- Mentor Programme.
- Business Expansion Grant.
- Digital for Business / Grow Digital.
- Green for Business / Energy Efficiency Grant.

Reported effects

Hard outcomes reported by the business included:

- Turnover increasing to €260,000, although the business could not estimate the pre-support position.
- Employment reportedly increasing from one to two staff.

Softer or enabling outcomes included:

- Improved decision-making.
- Stronger strategic direction.
- Improved management capability.
- Increased confidence in engaging with external bodies.

Contribution / additionality

The business identified mentoring and the Business Expansion Grant as the most beneficial supports. It reported that LEO staff and mentors helped identify business needs and provided relevant support. The business also noted initial difficulty finding the right contact and described the financial support application process as burdensome. Alternative support was described as very difficult to access, indicating high perceived additionality, although reported outcomes are not independently verified.

Learning points

- Mentoring can provide an important sounding board for early-stage businesses.
- Combining advisory and financial support can help new firms clarify strategy and invest in growth.
- The case highlights the importance of clear access routes and proportionate application processes for capacity-constrained start-ups.

EARLY GROWTH AND TESTING BUSINESSES

Case study 3: Nova Human Capital Management – early-stage testing and growth

Business context

Nova Human Capital Management is an early-stage professional services business based in Sligo. It provides organisational management and human resources (HR) systems services, including HR diagnostics, vendor selection, human resources information management (HRIS) project management and HR metrics dashboards. The business has sought to develop its client base, strengthen its online offer and increase capacity.

Supports used

- Priming Grant.
- Business Expansion Grant.
- Digital for Business / Grow Digital Voucher.

Reported effects

Hard outcomes reported by the business included:

- Turnover increasing to c.€300,000, although the business could not quantify what turnover would have been without LEO support.
- Employment reportedly increasing from one to two FTE.
- Development of new products and services.

Softer or enabling outcomes included:

- Validation of business growth ideas.
- Improved online platform and client access.
- Increased operational capacity.
- Stronger market presence.

Contribution / additionality

The business identified the Priming Grant as particularly important in supporting early-stage growth and the development of new products and services. The Business Expansion Grant was reported to have facilitated further investment and capacity building. The business described alternative support as difficult to access, suggesting high perceived additionality, although reported outcomes have not been independently verified.

Learning points

- Financial support can be particularly important for early-stage service businesses seeking to build capacity and market presence.
- Digital support can complement grant support by strengthening client access and service delivery.
- The case highlights the importance of local advisory relationships alongside financial support.

ESTABLISHED GROWTH AND EXPANSION BUSINESSES

Case study 4: DEM Bottling Solutions – growth and expansion support

Business context

DEM Bottling Solutions is an established manufacturing business in Mayo providing bottling, labelling, export support, and liquid and cask sourcing services. The company serves clients that require branded bottling solutions and support in reaching target audiences, including international markets. It provides an example of a regional SME seeking to expand capacity, customers and contracts.

Supports used

- Priming Grant.
- Business Expansion Grant.
- Training, networking and management development support.
- Mentoring support over a number of years.

Reported effects

Hard outcomes reported by the business included:

- Turnover increasing to c.€500,000, although the business could not estimate the counterfactual turnover position without support.
- Employment reportedly increasing from four to seven FTE.
- Ability to take on larger contracts and more customers.

Softer or enabling outcomes included:

- Validation of growth ideas.
- Increased operational capacity.
- Greater business resilience.
- Stronger confidence to invest.

Contribution / additionality

The business reported that LEO support helped validate growth ideas and facilitated further investment. The Priming Grant and Business Expansion Grant were identified as especially important in enabling the company to move to the next stage of development. Alternative support was described as difficult to access, suggesting high perceived additionality, although the reported outcomes remain self-reported.

Learning points

- Grant support can de-risk investment and give businesses the confidence to invest their own resources.
- The progression from Priming Grant to Business Expansion Grant can support phased growth.
- Local access to both financial and advisory support can be important for established regional SMEs.

Case study 5: Cushenden Woollen Mill – combined growth, digital and expansion support

Business context

Cushenden Woollen Mill is an artisan manufacturing company in Kilkenny producing woollen products including blankets, throws, hats, scarves and yarn. The mill has a long local heritage, while the business in its current form is an established SME employing 9 FTE. It operates in a traditional manufacturing sector, but with modern growth, product development and market access needs.

Supports used

- Business Expansion Grant.
- Digital for Business / Grow Digital Voucher.
- Green for Business.
- Mentoring and advisory support.
- Market Exporters Grant, although this sits outside the core scope of the evaluation.

Reported effects

Hard outcomes reported by the business included:

- Turnover increasing from c.€600,000 to c.€800,000.
- Employment increasing from six to nine FTE.
- New product development and business expansion.

Softer or enabling outcomes included:

- Improved business processes.
- Stronger strategic thinking.
- Better ability to manage growth.
- Greater confidence in future direction.

Contribution / additionality

The business reported that the Business Expansion Grant helped it invest its own funding in new product development, while digital support helped improve business processes and manage growth. It described alternative support as difficult to access, suggesting a high level of perceived additionality. These effects are self-reported and should be interpreted as contribution evidence rather than independently verified impact.

Learning points

- LEO supports can work effectively in combination, particularly where financial support is reinforced by digital and advisory inputs.
- Digital support can help traditional manufacturing businesses modernise processes and manage growth.
- The case illustrates the value of support pathways for established firms that are not directly supported by Enterprise Ireland.

Case study 6: Stainless Quality Fabrication Specialists – start-up to growth pathway

Business context

Stainless Quality Fabrication Specialists is a Limerick-based manufacturing business producing stainless-steel projects for sectors including construction, dairy, food processing, brewing and pharmaceuticals. The company was established in 2018 and has grown into a larger SME with an interest in future export markets. The case illustrates a business journey from start-up support into expansion.

Supports used

- Start Your Own Business support.
- Mentoring.
- Priming Grant.
- Business Expansion Grant.

Reported effects

Hard outcomes reported by the business included:

- Turnover of €2.3 million, compared with an estimated €1.5 million without LEO support.
- Employment reportedly increasing from 10 to 19 staff.
- Increased sales, productivity and operational capacity.
- Preparation for possible export market development.

Softer or enabling outcomes included:

- Increased confidence to invest.
- Stronger development pathway from start-up to established business.
- Positive experience of LEO accessibility and grant application support.

Contribution / additionality

The business reported that the Priming Grant and Business Expansion Grant helped increase operational capacity and drew in further investment from the business. It described alternative support as very difficult to access, indicating high perceived additionality. The Managing Director attributed a significant part of the company's growth journey to LEO assistance, although these effects remain self-reported.

Learning points

- Early-stage LEO support can contribute to businesses that later become larger, more established SMEs.
- Priming Grant can act as a progression route towards Business Expansion Grant.
- Some growing firms may benefit from longer-term mentoring to consolidate growth and prepare for exporting.

MATURE AND RESILIENCE-FOCUSED BUSINESSES

Case study 7: CICS Silo Clean Ltd – digital adoption and optimisation

Business context

CICS Silo Clean Ltd is a long-established, family-owned industrial and silo cleaning specialist based in Cavan. The business serves sectors including milling, dairy, food manufacturing, pharmaceutical, nutraceutical and general manufacturing. Although already digitally aware, the company identified scope to improve specific internal processes through digital adoption.

Supports used

- Digital for Business.
- Grow Digital Voucher.

Reported effects

Hard outcomes reported by the business included:

- Turnover increasing to c.€1.3 million, although the business could not quantify the pre-support counterfactual turnover position.
- Employment reportedly increasing from an estimated 28 FTE to 33 FTE as a result of LEO support.

Softer or enabling outcomes included:

- Streamlining of a specific business process.
- Efficiency gains.
- Management time freed up for wider business development.
- Improved ability to focus on other parts of the business.

Contribution / additionality

The business reported that digital support helped identify and implement an appropriate process improvement, generating immediate efficiency benefits. It described alternative support as difficult to access, suggesting high perceived additionality. The employment and turnover effects are self-reported, and the case should therefore be used as an illustration of plausible contribution rather than verified impact.

Learning points

- Digital support can generate bottom-line benefits by improving a specific process within an established business.
- Even firms that have already adopted digital tools may benefit from structured diagnostic and implementation support.
- The case points to future demand for support around artificial intelligence (AI) and more advanced digital process improvement.

Case study 8: Manna Organics – capability-building and long-term local support

Business context

Manna Organics is a certified organic fruit, vegetable and wholefood farm-shop business in Kerry. It sources produce from its own farm and neighbouring organic farms and has a strong ethical and local supply philosophy. The business is mature and has maintained a long-term relationship with its LEO from start-up through later development.

Supports used

- Start Your Own Business support.
- Mentoring.
- Training, networking and management development support.
- Digital for Business / Grow Digital Voucher.

Reported effects

Hard outcomes reported by the business included:

- Turnover of €561,000, compared with an estimated €400,000 if the business had not received LEO support.
- Employment reportedly increasing from 3–4 staff to 8 staff.

Softer or enabling outcomes included:

- Improved management capability.
- Improved business knowledge and skills.
- Improved productivity.
- Greater ability to respond to external issues and operational pressures.

Contribution / additionality

The business particularly valued training support across a wide range of functions, including bookkeeping, marketing, social media, production, employee management and payroll. The owner-manager emphasised that small business owners need to be multi-skilled and that the LEO training offer helped fill practical capability gaps. The business described alternative support as difficult to access, indicating high perceived additionality, although the figures are self-reported.

Learning points

- Capability-building support remains relevant beyond the start-up phase.
- Long-term LEO relationships can help small firms access the right support as needs change.
- Training and mentoring can contribute to business resilience by strengthening day-to-day management capability.

Case study 9: Baking Emporium Ltd – green and energy efficiency support for resilience

Business context

Baking Emporium Ltd is a family-run bakery in West Cork supplying freshly baked produce to clients across Ireland. It is a mature business with around 10 staff and has been operating for more than 30 years. The business does not typically access external business support, but engaged with the LEO in response to cost pressures and energy efficiency needs.

Supports used

- Business Expansion Grant.
- Green for Business.
- Energy Efficiency Grant.

Reported effects

Hard outcomes reported by the business included:

- Turnover of €500,000, compared with an estimated €480,000 without LEO support.
- Improved profitability through cost-saving measures.
- Better understanding of energy costs and potential overcharging.

Softer or enabling outcomes included:

- Improved understanding of energy and carbon impacts.
- Identification of cost-saving opportunities.
- Increased investment in energy efficiency measures.
- Improved environmental practices.

Contribution / additionality

The business reported that Green for Business and the Energy Efficiency Grant helped identify practical measures to reduce costs at a time of increased pressure. Alternative support was described as very difficult to access. The case suggests that green and energy supports may contribute to resilience and profitability even where immediate growth effects are modest. Reported outcomes are self-reported and should be interpreted cautiously.

Learning points

- Green and energy supports can provide practical cost-saving benefits for established local businesses.
- These supports may be particularly relevant for firms that do not normally engage with business support.
- The case illustrates the link between environmental practice, cost reduction and business resilience.

Case study 10: The Transcription Shop Ltd – resilience and adaptation in a disrupted market

Business context

The Transcription Shop Ltd is a well-established SME based in Dublin Fingal that has provided audio and video transcription services for more than two decades. The business operates in financial, professional and business services, offering transcription, recording, editing, timecoding, subtitling and related services. The rapid development and adoption of artificial intelligence has disrupted the transcription market, reducing demand for some traditional services and requiring the business to reassess its strategic direction.

Supports used

- Mentor Programme.
- Training, networking and management development support.

Reported effects

Hard outcomes reported by the business included:

- Turnover maintained at c.€150,000, compared with an estimated €120,000 without LEO support.
- Employment maintained at seven staff, compared with an estimated five staff without LEO support.
- Maintenance of business performance in a challenging market environment.

Softer or enabling outcomes included:

- Improved decision-making and strategic direction.
- Improved management capability.
- Increased confidence in engaging with external bodies, including the LEO.
- Strengthened business knowledge, networks and contacts.
- Greater resilience in responding to AI-led market disruption.

Contribution / additionality

The business had not previously had a strong need to engage with LEO support, but turned to Dublin Fingal LEO when AI began to affect demand in its core market. Through LEO staff, mentoring and training support, the business reported that it was able to pivot, digitise and develop a stronger local, national and international brand. The support helped the business re-establish itself in the sector, expand networks and strengthen sales and marketing activity.

The business described alternative support as neither easy nor difficult to find, suggesting moderate perceived additionality. The reported turnover and employment effects are self-reported and have not been independently verified. The case should therefore be interpreted as illustrative contribution evidence, particularly in relation to resilience and adaptation rather than direct growth.

Learning points

- LEO supports can help mature businesses respond to external market shocks, including technology-led disruption.
- Mentoring can help established firms take stock, reassess their position and define a new strategic direction.
- Training and networking supports can address practical business needs around sales, market reach and customer development.

- The case illustrates that LEO support can be relevant to businesses at any stage, including firms that have not previously accessed business support but face a new strategic challenge.

CROSS-CASE LEARNING SUMMARY

The case studies provide practical examples of how LEO supports may contribute to business development at different stages. They are not a substitute for the wider survey, administrative and stakeholder evidence, but they help illustrate the mechanisms through which LEO support can generate value.

Across **recent start and early-stage businesses**, the cases suggest that LEO support can help validate business ideas, build confidence, support early investment and strengthen basic management capability. The combination of Start Your Own Business, Priming Grant, mentoring, training and digital support appears particularly relevant for businesses that are still testing their model, building their customer base or deciding whether to invest further.

Across **early growth and testing businesses**, the evidence suggests that financial and digital supports can help businesses develop market presence, increase capacity and move from initial trading into a more structured growth phase. These businesses may not yet have the scale or track record to access more specialised forms of support, making the local accessibility of the LEO offer particularly important.

Across **established growth and expansion businesses**, the case studies show how Priming Grant, Business Expansion Grant, mentoring and digital support can help businesses de-risk investment, increase capacity, develop new products or services, take on larger contracts and create employment. Several cases suggest that LEO support can act as a bridge between early-stage local support and more ambitious growth, including potential export development.

Across **mature and resilience-focused businesses**, the case studies show that LEO support remains relevant beyond start-up and expansion. Digital, green, energy efficiency, mentoring and training supports can help established firms improve processes, reduce costs, strengthen resilience and respond to changing market or operating conditions. These cases are important because they show that LEO support is not only about start-up formation or job creation, but also about helping existing small firms adapt and remain viable.

Taken together, the cases reinforce five wider lessons. First, businesses often experience LEO support as a pathway rather than as a single intervention. Second, financial support and advisory support are often mutually reinforcing. Third, capability-building outcomes such as confidence, management skills, strategic direction and process improvement are important in their own right and may support later performance gains. Fourth, additionality appears strongest where businesses have limited access to alternative support. Fifth, the quality of the local relationship matters, but access routes and application processes need to remain clear and proportionate.

Overall, the case studies support a positive but qualified interpretation of LEOs' contribution. They suggest that LEO supports can help firms start, invest, modernise, improve capability, reduce costs, build resilience and grow.