

**First steps of an information system on social economy organizations:  
Qualifying the organizations  
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### ***Abstract***

*Although it has a rich history, the social economy does not yet have a clear, unanimously supported definition. This makes it difficult to delineate and follow the evolution of the social economy for statistical purposes. Some definitions of the social economy only incorporate the non-market components, and others, only market-based ones. This text proposes a new approach which groups together both the non-market and market components of the social economy. Four qualification criteria are proposed which allow us to situate, along four continuums, the degree to which organizations correspond to these criteria.*

### ***Résumé***

*Si l'économie sociale a une histoire déjà riche, sa définition ne fait pas aujourd'hui l'unanimité, rendant difficiles sa délimitation et le suivi de son évolution à des fins statistiques. Certaines définitions n'intègrent que les composantes non marchandes dans le champ de l'économie sociale ; d'autres, à l'inverse, uniquement les composantes marchandes. Ce texte propose une nouvelle approche regroupant les composantes non marchandes et marchandes de l'économie sociale. Quatre critères de qualification sont proposés, ce qui permet de situer, sur quatre continuums, le degré de correspondance des organisations à ces critères.*

### ***Resumen***

*Si la economía social tiene una historia ya rica, su definición no hace hoy la unanimidad, dificultando su delimitación y el seguimiento de su evolución con fines estadísticos. Algunas definiciones sólo integran los componentes no comerciales en el campo de la economía social; otros, al contrario, solamente los componentes comerciales. Este texto propone un nuevo enfoque que agrupa los componentes no comerciales y comerciales de la economía social. Se proponen cuatro criterios de calificación, lo que permite situar, sobre cuatro series, el grado de correspondencia de las organizaciones a estos criterios.*

## **1. Introduction**

Over the past twenty years, the social economy (SE) has increasingly become a topic of current interest. Although it has a rich history, the social economy does not yet have a clear, broad and unanimously supported definition. This makes it difficult to delineate and follow the evolution of the social economy for statistical purposes. Some definitions of the social economy only incorporate the non-market components (not for profit organizations), and others, only market-based ones (co-operatives, mutual societies)<sup>1</sup>. Rather than arguing that one

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<sup>1</sup> Some even cover a very wide spectrum including socially responsible capitalist enterprises. In this text though, we will use the term social economy to include associations, cooperatives and mutual benefit societies, as well as organizations for community economic development, worker unions' funds, and other non capitalist types of enterprises.

definition is better than another or suggesting yet again another definition, we argue that the SE can be looked at through a wide lens, offering different depths of fields depending on which portion of the picture interests most the observer. This text proposes an approach which encompasses SE organizations and activities in a broad perspective (market and non-market components) and enables the identification of subsets of the population of organizations, in correspondence to some of the definitions of the SE currently in use: co-operatives, non profit institutions, social enterprises.

Given its organizational characteristics, its institutional rules, and its particular relationships with the State and the market, the social economy constitutes a specific sector which should be recognized and distinguished from others (Defourny and Monzón Campos, 1992). Nevertheless it remains a difficult sector to delineate. On the one hand, the SE is a phenomenon that is not yet well documented and remains under-theorized, especially with respect to its specific contribution to the dynamics of development. On the other hand, the boundaries of the field are apt to shift depending on how social economy is defined, the historical circumstances, the networks and groups that are created, the institutional environment, the market, etc. It is clear that social economy is a polysemic expression, covering an extremely wide range of practices (Lévesque and Mendell, 2004). Methodologies and indicators specific to the social economy are not yet well recognized, whether from a political or a scientific standpoint.

Now the public authorities, as well as the key players in the system, have formulated requests to both measure the sector and evaluate the contribution of the social economy. At the international level, two satellite accounts manuals have been developed, one for the non-profit

institutions (United Nations, 2003), and another for the market social economy – mutual societies and co-operatives – in Europe (Barea and Monzón, 2006). A study was recently conducted on European social enterprises (Heckl and Pecher, 2006; Spear and Bidet, 2005). Closer to us, in many regions in Canada as well as by many actors in Quebec, regional and local portraits of the SE are being undertaken. Methodologies vary from one initiative to another, showing for the specific needs or choices made. None, however, has beforehand defined an inclusive population of SE organizations, covering both the market and the non-market SE. Therefore, it is not possible measure the size and scope of the SE in the economy.

The database project of the Canada Research Chair on the Social Economy aims to build an information system to collect and analyse data on the social economy sector and follow its evolution over time. In delineating the field of the social economy, the database must take into account the diversity of organizations that make up the sector, and describe the characteristics of these in such a way that they can be grouped according to different definitions of social economy. Two principal ideas are brought forth by this approach. 1) The first is that the SE organizations can be identified and distinguished from non-SE organizations by empirical criteria. 2) The second is that the economic activities undertaken by the SE organizations can be classified in a one and unique classification system. Each of these ideas, although not revolutionary in itself, offers a new tool for portraying the SE when brought together with the other one. The Information System on the Social Economy Organizations (ISSEO) of the Canada Research Chair on the Social Economy is based on two main pillars, a qualification system of organizations and a qualification system of economic activities. This text explains the qualification system of SE organizations.

We will begin by presenting different definitions of the SE and position the rating system we have adopted for our database on social economy organizations in Québec. Four qualification criteria are proposed which allow us to situate, along four continuums, the degree to which organizations correspond to these criteria. We then compare our qualification criteria with those used in other studies.

## **2. Social economy: a brief overview of definitions**

Different definitions of the social economy have been put forward and still co-exist today. Three «classic» definitions are often recalled in the literature on the social economy in Québec: the definition by components (Desroche, 1983), by rules of operation (Vienney, 1994) or by values and principles (Defourny, 1992). For Desroche (1983: 204-6), the basic **components** of the social economy sector are: 1) the cooperative, 2) the mutual society, and 3) the association. In addition to these central components, there are four peripheral ones: the communal enterprise (bordering on the public sector); the community, or popular, enterprise (bordering on the community sector); the joint enterprise (bordering on the trade union sector), and the participative enterprise (bordering on the private sector).

Vienney's (1980; 1994) definition is based on the **rules of operation** which characterize the dual relationship of membership and of activity within cooperatives. These four rules are: 1) the rule regarding membership: democratic functioning (one member, one vote); 2) the rule linking members to the enterprise: members determine the enterprise's activity; 3) the rule linking the enterprise to its members: the distribution of surpluses (profits) is limited or

prohibited; 4) the rule regarding the enterprise: reinvested surpluses remain indefinitely collective property.

Finally, a third definition, based on the **values** of solidarity, autonomy and citizenship, was proposed by Defourny (1992) for the Walloon Council for the Social Economy. Specifically, this definition is derived from four principles: 1) objective of service to the members and the community rather than of profit; 2) management autonomy (the primary element distinguishing it from the public sector); 3) democratic decision-making process; 4) primacy of persons and of work in the distribution of revenues and surpluses. It is largely from this definition that the *Chantier de l'économie sociale*, in Québec, has taken inspiration for its own, but with the addition of a fifth principle: that of participation, empowerment, and responsibility.

While the European – mostly the Latin and the French – traditions of social economy has left its mark on Québec (Evers and Laville, 2004), the dominant approaches in other provinces in Canada have been, until quite recently, threefold: 1) that of the co-operative sector, well represented by the work of the Center for the Study of Co-operatives in Saskatoon; 2) that of the «non-profit» sector, inspired by the United States and the international comparison studies carried out at the Johns Hopkins University (Hall *et al.*, 2005; United Nations, 2003); and 3) that of community economic development, (Shragge, 1993). Within this perspective, large Pan-Canadian studies have focused on non-profit and volunteer organizations (Berdhal *et al.*, 2005; Statistique Canada, 2004), defined institutionally by the criterion of being non-profit-making (with the associated legal status), without reference to the criterion of democratic decision-making inherent in to the Québec definition (Vaillancourt, 2005: 8). The non-profit

approach does not allow us to understand the social economy adequately; it is at the same time too broad and too restrictive<sup>2</sup>. For example, cooperatives and mutual societies, which are definitely clear components of Québec's social economy, are not considered in a strict non-profit approach<sup>3</sup>, whereas not all non-profit organizations belong to the social «economy» as they do not have the purpose of producing goods or services. Furthermore, for purposes of international comparison, it is useful to keep in mind certain European studies looking at more market-oriented components of the social economy, such as the «social enterprise» (see the EMES European Research Network<sup>4</sup>), or the «market» social economy, that covers co-operatives and mutual societies (see the European Manual for drawing Satellite Accounts for social the market social economy (Barea and Monzón Campos, 2005).

There is no need to expound further on the fact that definitions of «the social economy», of which there are many, vary according to context, and over time, and sometimes even depending upon the will of the government programs aimed at supporting its development. A summary table presented in Appendix 1 allows us to see the differences between certain definitions used in studies on the social economy and related domains, while highlighting some common features. We believe that an information system on the social economy should make it possible to draw different perimeters of the social economy according to the definitions employed, thereby covering an area that is broader rather than restrictive, which we can later restrict or enlarge upon, according to comparisons and dialogues required between different concepts and studies. Moreover, such a system should make it possible to understand the evolution and the shifts taking place within this sector.

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<sup>2</sup> The definition of the social economy provided by Quarter *et al.* (2003) illustrates the former case, where the social economy is made up of three types of organizations: public-sector non-profits; market-based social organizations; civil society organizations.

<sup>3</sup> With the exception of solidarity co-ops.

<sup>4</sup> <http://www.emes.net/>

This brings us directly to the question of **indicators**. The five characteristics of the international definition of non-profit institutions (United Nations, 2003) do not make it possible for us, *a priori*, to position organizations in relation to each other. In fact, the organizations which fit into this definition satisfy five criteria: they are organized largely as non-profits; do not distribute surpluses; are non-governmental, autonomous, and volunteer-based. While some of these criteria (e.g. the non-governmental character and the formal legal constitution) can be decided with a yes/no response, we believe the three others would be better expressed along a continuum, which is the advantage of our proposal. In the following section, we will examine the four criteria that we propose, and how they can become operational.

### **3. Qualification criteria and their indicators**

The contours of the social economy vary in accordance with the definitions employed. We have put forward, above, a number of problems presented by different visions of the social economy as held by theorists or as adopted by certain major studies of the sector. Furthermore, those definitions or the contours of what they capture may vary with time. For instance, many organizations formally constituted as associations (non-profit organizations) who did not initially have an economic mission, may yet develop economic activities in order to support their social mission, or even just to survive. The social characteristics of organizations in the social economy may also be adopted by other organizations created as companies, but who wish to assume a social, responsible and civic mission. «Social enterprises» can just as well be for-profit companies that redistribute a portion of their profits in the community (such as

Community Interest Companies in Great Britain), as they might be non-profit organizations that develop economic activities (as in the definitions applied in English Canada, the United States and many European countries). In fact, many volunteer organizations may likewise be seen as contributing to the economy (in the substantive sense), even if the resources involved and the services produced are «free». This is, of course, an indication of the dynamism of the social economy, but it can also lead to confusion when it comes to delineating the field and evaluating its specific contribution. Thus, we are attempting to develop criteria which will allow us to describe organizations in the social economy across a set of continuums. This should facilitate an interpretation of the field which is more inclusive than exclusive, and provide some indicators of change in order to monitor its evolution.

Four qualification criteria are proposed for organizations in the social economy. These are inspired, in part, by the social-economic approaches of Claude Vienney (1980; 1994) and Henri Desroche (1983), presented earlier. These criteria allow us to identify and classify organizations. First, however, we should emphasize two preliminary comments: The first is that cooperatives, associations, and social economy enterprises set up as non-profit organizations (e.g. work integration enterprises, etc.) have, by their very nature, a high probability of satisfying all four criteria. Nevertheless, these criteria are not discriminating, to the extent that there is not always a clear boundary between social economy organizations and other organizations in the etc. And, the second comment comes as the corollary of the first one. Those four criteria do not represent a definition of the social economy as a «sector». The social economy is often reduced to a «third sector» obtained by deduction after having excluded the for-profit enterprises which make up the «market» (market sector), on the one hand, and the public administration and organizations (public sector), on the other hand. In

fact, organizations in the social economy do not constitute a homogeneous group, as do, for instance, for-profit enterprises. Some are fully engaged in a social economy process, i.e., they will perfectly satisfy the four qualification criteria. Others conform to the criteria to varying degrees. This is also true in the case of for-profit enterprises. We will see later how we can draw different perimeters of the field of social economy, depending on the continuums of correspondence to the criteria.

In clear, we suggest to describe organizations based on their practices, and according to the institutionalization of these practices<sup>5</sup> (particularly in terms of rules of operation), rather than by their legal status or by characteristics that do not call for a strict yes/no answer. The four criteria we propose correspond to the principles or rules of management common to social economy organizations that generally appear in the laws, statutes or internal regulations governing these organizations. These rules may be modified marginally or substantially, then requiring us to re-qualify the organizations concerned. Several indicators can be associated with each of these four criteria, providing detailed information on how the concerned organization conforms to the qualification criterion. Each criterion can be given a weight in order to assign a percentage value to the degree of conformity in question.

### **3.1 Carrying on an economic activity**

We first ascertain the existence of a production of goods or provision of services. Resources can come from multiple sources: market, public, non-monetary. This is why not all organizations that sporadically carry on an economic activity satisfy this first criterion for

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<sup>5</sup> An institutionalized rule of operation is more likely to be reproduced through time than a discretionary and optional one. E.g. making donations to the community organizations on a year to year basis VS reinvesting in the organization or redistributing to users the eventual surpluses under a juridical constraint.

qualification (for example, an advocacy association whose only economic activity is organizing an annual fundraising dinner), as well as those whose economic activity is limited to collecting dues or membership fees. In itself, an organization's mission or function (protection of rights, representation, leisure activities) provides no indication as to whether it satisfies or not this criterion. It is only when this mission or function is not accompanied by any economic activity that we can draw conclusions regarding conformity to the criterion<sup>6</sup>. One indicator can be the type of economic activity as defined by international conventions between national statistical institutes<sup>7</sup>. Another can be the fact that the organization mobilizes economic resources, whether those come from the sale of goods and services onto the market, from subsidies or public transfers, or from volunteer work, donations and gifts.

### **3.2 Prohibition or limitation of profit distribution to capital**

Organizations of the social economy do not pursue profits as their main objective, i.e., whenever a return on capital among the members is authorized, it is limited. Once such a return on capital has been carried out, any surpluses are either reinvested in the organization or distributed to the community. One indicator can be the legal status of the organization containing an asset-lock constraint or a limitation to distribute the surpluses to shareholders. Another can be the actual portion of the surplus earned that is distributed (after necessary reinvestments) to members or to other collective enterprises (coop, mutual, non-profit or public) on another basis than shareholding (patronage, use, collective not for profit venture, etc.).

### **3.3 Formal voluntary association of persons and/or of collective bodies**

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<sup>6</sup> Nevertheless, non-profit organizations that develop a social economy project (in accordance with programs currently in place in Québec, for example) can be identified according to the proportion of their economic activities.

<sup>7</sup> We propose, in a further discussion a classification of SE activities based on the NAICS codes (see Bouchard, Ferraton, Michaud, to come 2007).

The creation of a social economy organization is the result of initiatives on the part of either individuals or collective bodies that are independent of the public authorities. Generally, membership in a social economy organization is open to any person who wishes to join, subject to certain conditions (the payment of a membership fee, for example). One indicator can be the legal status of the organization (collective ownership). Another can be the type of members (physical persons or collective organizations).

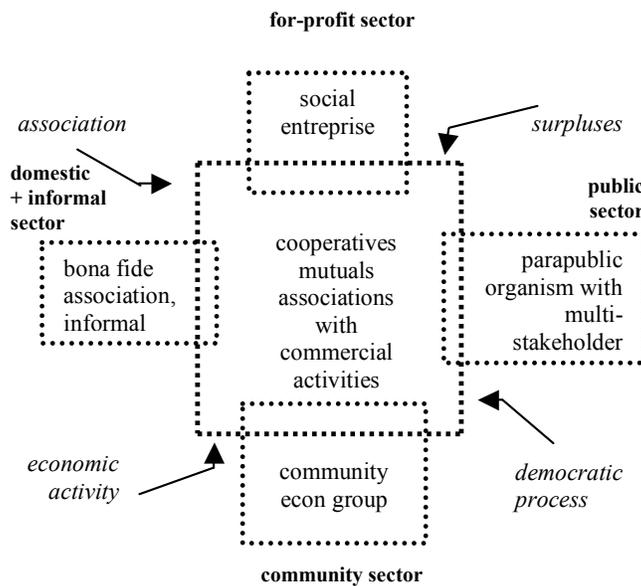
### **3.4 Democratic governance process**

Social economy organizations grant decision-making powers according to use and not to the share of capital held. Generally they allocate each member equal status in the collective decision-making process (i.e., in democratic proceedings constituted by the annual general meeting and board meetings), whatever their contribution to the organization. There may be exceptions, as in the case of agricultural cooperatives that have a proportional voting system according to the volume of transactions, or the cooperative housing confederation that allocates seats to the regional federations in proportion of their membership numbers. Indicators can be the conformity to a legal obligation or internal rule (e.g. one person, one vote), the attendance to general meetings, etc.

These four indicators of qualification (a summary table of which appears in Appendix 2) define the rules of operation of social economy organizations. The following figures are based on a figure developed by H. Desroche, which we have adapted to illustrate the permeability of the boundaries between the «hard core» of the social economy and other organizational forms that can, according to certain definitions, enter into the field of social economy (Figure 1).

Thus, social economy organizations (in the central rectangle of the figure) are differentiated from:

- associations or other non-profit organizations that produce no goods and/or services, by carrying out an economic activity (1st criterion);
- for-profit market organizations (generally identified with the «market»), by establishing social rules prohibiting or limiting the sharing of surpluses (2nd criterion);
- informal organizations and/or domestic units, by constituting a formal voluntary organization (3rd criterion); and
- organizations of the public and capitalist sectors, by adopting the democratic principle (4th criterion).



**Figure 1. Characteristics of social economy organizations**  
Adapted from Desroche, 1983:205

Figure 2 illustrates what is meant by «continuums» using three hypothetical examples of organizations positioned according to indicators of correspondence to the four criteria. It can be seen that the area occupied by the cooperative is much greater than that of the non-profit organization that does not undertake an economic activity, or that of the for-profit enterprise

that distributes some of its profits to the community. This attests to the greater institutionalization of the qualification criteria in the cooperative than in the for-profit enterprise, where the decision to give profits to the community arises from the goodwill of shareholders, rather than any legal rule or operating principle. It also enables to sort out two types of associations, those who produce goods or services, and those who do not.

#### **4. Conclusion**

Social economy organizations are called upon to assume an ever-increasing role in the production and delivery of goods and social services in the public interest. The difficulties encountered by economies in pursuing full employment and the inadequacies of the social state have had major consequences on the landscape of social economy organizations. New needs emerge, linked to regional development, unemployment, exclusion, population aging,

breakdown of the family model, and difficulty in reconciling family and work life. Growing privatization and commercialization of public services have introduced competition in areas of activity which until now had been outside the free market. Services which have traditionally been public services have become new «markets» for social and collective entrepreneurs. Delocalizations and shutdowns of large businesses raise the issue of regional redevelopment based on local activities geared towards a global market. The pace at which social-economic organizations are being created is therefore accelerating, thanks in part to public policies that recognize them and support their development.

However, the social economy is also an older phenomenon. Mutual benefit societies, cooperatives and associations have been part of the economic landscape since the end of the 18th and beginning of the 19th centuries. Also born out of necessity and ideals, they emerged in clusters, each time in response to major socioeconomic transformations. They developed activities which were predominantly economic and which had, in turn, considerable economic and social impacts: modernization of agriculture and fisheries; creation of a broad network of financial institutions on a territorial scale; development of the regional economy and of employment, for example in forestry; organization of funerary services; establishment of grocery stores; construction and renovation of a large stock of community housing units, etc. The social economy is thus a far-reaching network of organizations whose missions account for both change and continuity<sup>8</sup>, as much in the realm of economic development as in social development.

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<sup>8</sup> By way of example, we note that the number of reporting cooperatives increased by 5.3% between 1999 and 2003 (MDEIE, 2005).

We have been able to verify, in various theoretical texts and from certain studies, the variety and heterogeneity of definitions and organizations of the social economy and related domains: co-operative sector, non-profit sector, third sector, voluntary sector, even civil society. These various definitions nevertheless have points in common. The difficulty in delineating the field of the social economy is due to its double roots, both in the civil society and in the economy. The different definitions of the social economy emphasize one or another of its principal characteristics: organization of economic activity; non-capitalist rules of distribution and accumulation; legal and decisional autonomy; democratic powers of users or their representatives. The choice of emphasis is likely due to different ideas of the social economy's contribution: as a producer of goods and services; as an alternative and sustainable form of development; as an organization of the civil society; as a means of social and economic democratization. We believe that in combining these criteria we can develop a picture of the social economy that encompasses all of these contributions and allows them to be measured.

With the database we are creating at the Canada Research Chair on the Social Economy, we aim to define the various domains that make up the social economy without limiting ourselves to any overly-constraining definitions. To accomplish this, we are developing a system of four qualification criteria that make it possible to define the more or less narrow perimeters of the social-economic sector and to delineate different areas or subsets, in accordance with the various definitions of the social economy and their evolution.

We have inventoried the social economy organizations across the whole territory of Québec and in all sectors of activity. This database allows us to draw an exhaustive picture of the sector. It will be used to analyze the results of studies, which will have a consistent field of

reference, and will make it possible to follow the evolution of the sector over the long term. We also hope to create data warehouses with other studies, for instance on employment, household income, regional investments, etc., to better understand the contribution of the social economy to the dynamics of development.

## APPENDIX 1. SUMMARY OF OUR PROPOSAL AND COMPARISONS

<p>Definitions/ Frames of reference</p> <p>Criteria</p>	<p>International definition from the <i>Handbook on Non- Profit Institutions in the System of National Accounts</i> (UN, 2003)</p>	<p><i>Social Economy Framework</i> by Quarter, Sousa, Richmond and Carmichael (2001)</p>	<p>Quarter, Mook and Richmond (2003)</p>	<p>EMES European Research Network</p>	<p>Satellite account for social economy enterprises (methodology developed by Barea and Monzón Campos, 2005)</p>
<p>Carrying on an economic activity</p>		<p>✓ “Market reliance”/ entrepreneurial activities</p>		<p>✓ Ongoing activity of production of goods and/or services</p>	<p>✓ Production intended mainly for market sale at economically significant prices (&gt; 50% of production costs financed on the market)</p>
<p>Existence of rules or policies prohibiting or limiting the sharing of potential surpluses among members</p>	<p>✓ “Not-for-profit” (and “non-profit distributing”)</p>	<p>✓ Social property  (“owned socially or, arguably, by no one”, neither individual nor governmental, p. 354) AND constraint of non- distribution of profits (2 basic conditions; the following “criteria” are in fact characteristics)</p>	<p>✓ “Social ownership”, i.e., generally no shareholders; assets do not belong to any particular individual; reinvestment of surpluses into services; in case of dissolution, assets are awarded to an organization with similar goals</p>	<p>✓ Limitation on distribution of profits</p>	<p>✓ Allocation of surplus, if one exists, in proportion to the activity</p>

<b>Definitions/ Frames of reference Criteria</b>	<b><i>Handbook on Non-Profit Institutions in the System of National Accounts</i></b>	<b><i>Social Economy Framework</i></b>	<b>Quarter, Mook and Richmond (2003)</b>	<b>European Research Network, EMES</b>	<b>Satellite account for social economy enterprises</b>
Formal voluntary association of persons or collective entities	<ul style="list-style-type: none"> <li>✓ Non-compulsory: participation is not mandated by law or other conditions of citizenship</li> <li>✓ Organizations with a certain degree of internal organization structure; goals and activities; organizational boundaries or a legal charter of incorporation</li> </ul>	(✓ “Volunteer participation” in the sense of volunteerism)	<ul style="list-style-type: none"> <li>✓ Minimal formal structure, even if they are not formally incorporated, AND “Volunteer or social participation”</li> </ul>	<ul style="list-style-type: none"> <li>✓ Initiative arising from a group of citizens</li> </ul>	<ul style="list-style-type: none"> <li>✓ Formally organized, i.e.e.a.g., endowed with its own corporate status</li> </ul>
Democratic decision-making process		<ul style="list-style-type: none"> <li>✓ Democratic decision-making</li> </ul>		<ul style="list-style-type: none"> <li>✓ Decision-making power not based on the holding of capital</li> </ul>	<ul style="list-style-type: none"> <li>✓ One person, one vote. Members have majority or exclusive control over the decision-making process within the organization</li> </ul>
Other criteria	<ul style="list-style-type: none"> <li>- “Institutionally separate from government”</li> <li>- “Self-governing”</li> </ul>	<ul style="list-style-type: none"> <li>- Social objectives</li> <li>- “Government dependence”/ partnership</li> </ul>	<ul style="list-style-type: none"> <li>- “Civic engagement”</li> </ul>	<ul style="list-style-type: none"> <li>- Initiative of a group of citizens</li> <li>- Minimal number of paid positions</li> <li>- Significant level of economic risk</li> <li>- Explicit objective of service to community</li> <li>- Multi-stakeholder dynamics</li> </ul>	<ul style="list-style-type: none"> <li>- Self-help</li> </ul>

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