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Advancing the Social Economy for Socio-economic Development: International perspectives

Crystal Tremblay

Advancing the Social Economy for Socio-economic Development: International perspectives

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*Produced for the Public Policy Facilitating Committee
of the Canadian Social Economy Hub.*

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The Canadian Social Economy Research Partnerships (CSERP) will periodically publish research papers on the Social Economy. The papers will be by both scholars within the academy and by practitioners. CSERP hopes these papers will increase understanding of, and discussion about, the social economy and ideas, past, present and future.

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ABSTRACT

Concepts and frameworks for the Social Economy have been the subject of increasing attention for academic analysis, public policy by governments, and collaborative action by civil society movements, both in Canada and internationally. The growing attention to the concept of the Social Economy (SE) is indicative of efforts to address inter-related social, economic and environmental issues affecting the sustainable development of people, communities, and nations, and the inter-dependent nature of global human development. Despite the increasing application of this concept and initiatives related to it there are limited syntheses that provide a comparative picture of the evolving state of public policy internationally. This review highlights international public policies (from academic and practitioner sources) that use the Social Economy as a framework to enhance socio-economic and environmental conditions. The review aims to capture information on ways governments are creating new policy instruments that strengthens the Social Economy in response to challenges such as poverty, social exclusion, income inequality, urban decline, unemployment, environmental and ecological degradation, and community sustainability. This review is prepared for the Canadian Social Economy Hub (CSEHub), a five-year community university research alliance on the Social Economy funded by the Social Science and Humanities Research Council (SSHRC). The findings of this review point to categories and examples of policy and program instruments used by governments and civil society in various jurisdictions internationally that may be relevant to achieving similar socio-economic development outcomes in the Canadian environment.

Keywords: social/solidarity economy, community-economic development, civil society, nonprofit sector, voluntary sector, cooperative development, mutual associations, public policy, international, literature review.

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FORWARD

On behalf of the Social Economy Hub Public Policy Facilitating Committee, we welcome you to the first of a series of reports aimed at clarifying the meaning and presence of the Social Economy, both nationally and internationally. The committee operates in a facilitative capacity on behalf of the Social Economy Hub. The committee collaboratively sets priorities and fosters exchanges on public policy issues across Canada. In 2008, the committee embarked on an initiative to synthesize the vast literature and policies associated with the Social Economy. The initiative is intended to contribute to work by academics, practitioners and policy makers to strengthen the policy environment for Canada's Social Economy.

This report is the first of three documents to investigate different areas associated with the Social Economy. This first paper is a comprehensive literature review of the unique role that the Social Economy plays in four public policy areas: social, economic, and human development, and environmental sustainability. The second paper will build on this literature review by focusing on the public policy instruments used to support the Social Economy in different jurisdictions. In the third and final report, the author will provide an analysis of the findings from the first two papers and provide recommendations for enabling academics, practitioners and policy makers to participate in activities and initiatives to strengthen the public policy environment for Canada's Social Economy.

In this first paper the reader will be provided with an analysis of literature from around the world that provides a clear context for understanding how the Social Economy is working in the present day. The reader will encounter examples and cases that show the vastness and complexity with which the Social Economy is practiced to achieve public policy outcomes of relevance to social, economic and environmental goals. The scope of work being done by researchers and practitioners to examine the Social Economy and its outcomes presents a key challenge to developing a discourse to coherently explore the Social Economy and its relevance to key public policy challenges. Crystal Tremblay has successfully developed a report that contributes to the development of a concise framework for examining the Social Economy as a distinct "sector" purposefully working through its many actors and component groups to achieve identifiable public policy outcomes. The three guiding questions for the report (set out in the introduction) provide a lens for comparative analysis of developments and thinking about the Social Economy in the context of public policy, and the gaps that exist in the research and literature to-date.

In this report the reader will notice that the "Social Economy" is itself a contested term in the literature with no single definition. Consequently, this report is intended to contribute to the forming of questions and encouraging debate in the context of a growing discourse on the Social Economy as a constructive organizing framework that is an alternative to the hegemonic dominance of the economic discourse within the public and private sectors. The objective of this undertaking is to provide key actors with examples of successful initiatives, working policies and policy development processes. The intention is for individuals to use this material for advocacy and learning purposes. We welcome your feedback and hope you enjoy this series of reports.

Sincerely,

Dr. Jorge Sousa
Co-chair, Public Policy Facilitating Committee

Rupert Downing
Co-chair, Public Policy Facilitating Committee

1.0 Introduction: A Global Movement to Advance the Social Economy

This literature review highlights research in both the academic and practitioner sectors of public policy developments specific to the Social Economy (SE) in Canada and around the world. It provides an overview of how the SE is conceptualised, and what role it plays in public policy as an innovative framework to enhance the social, economic and environmental conditions of urban and rural communities. In doing so, arguments are presented for the development of an economic order based on solidarity, participation and cooperation as an alternative to the mainstream neo-liberal capitalist economy. Considering the plethora of literature on this topic, this review attempts to provide a reflective sample of key works from around the world, and an analytical space to discuss the various approaches and typologies deemed appropriate that are advancing the Social Economy. A landscape is provided of the various arguments and issues associated with the Social Economy, a description of some of the key policy outcomes, and the unique instruments being used to achieve these outcomes.

This review investigates the following questions:

- What are the common elements of a public policy environment supportive of the Social Economy?
- How is the Social Economy framework achieving socio-economic development and environmental sustainability and what are the public policy outcomes?
- What are the gaps in the literature related to investigating the Social Economy?

The information presented in this literature review was compiled from various sources including academic literature, government documents, and program websites. The data was compiled between December 2008 and July 2009, and is not inclusive of all relevant material available. Some of the literature included does not specifically use the Social Economy terminology but explicitly describes elements of what it aims to achieve. Other pieces of work specifically speak to the unique role of the SE towards socio-economic development and environmental sustainability that the private and state sector cannot produce, and how the policy environment is changing to support this unique role.

The Social Economy for an Alternative Future

Global challenges to socio-economic development and environmental sustainability have prompted increased efforts to find alternative strategies for development. There is a growing global movement to advance concepts and frameworks of the *Social Economy* (SE) as a way to address increasing inequality of social, health, economic and ecological conditions, to provide alternative solutions to the perceived failure of neo-liberal dominated globalisation (Laville, 1994; Allard & Matthaei, 2008; Arruda, 2008) and to address the weakening social capital of communities (Putnam, 2000). In countries around the world new public policy is being developed to create supportive environments for these alternative approaches (Ailenei & Moulaert, 2005; Vaillancourt, 2009; Guy & Heneberry, 2009) offering a timely opportunity for Canada to investigate best practices in social policy that might be relevant to its own objectives for a sustainable and equitable future. This movement is being referred to internationally as Social Economy (EU, Quebec) Solidarity Economy (Argentina, Brazil, Chile, Quebec), People's Economy (Asia) Associative Movements (Senegal, Turkey), Civil Society (South Africa), and Community Economic Development (Australia, New Zealand, USA, Anglophone Canada). Despite the growth of this movement, much remains to be done in order to create the necessary enabling environment to support the development of Social Economy organizations, and to mainstream the sector in economic and social policies in order to maximise its impact on the economy.

Some have argued that the current world crisis has been attributed to principles of domination and exclusionary private accumulation, and that leadership for a new paradigm must come from popular civic initiatives centered outside the institutions of state (Korten, 2006; Hawken, 2008). Hawken (2008) describes this growing international social phenomenon based on the idea that collectively, empowered citizens can succeed on challenging issues such as climate change and social justice, and that by working together citizens can recreate the whole of society. Thousands of social and environmental organizations around the world are spearheading this movement and challenging the paradigm of an unsustainable and unjust future. There is no doubt that a new social and economic paradigm is a necessary step towards global sustainability, encompassing the fusion of economic, social and ecological goals.

This organizing has taken the form of local, regional, national and international networks that link together diverse economic justice initiatives. Examples of these networks include: the *Brazilian Solidarity Economy Forum*, which brings together twelve national networks and membership organizations with 21 regional Solidarity Forums and thousands of co-operative enterprises to build mutual support systems, facilitate exchanges, create solidarity enterprise programs and shape public policy; the *Intercontinental Network for the*

There is a growing global movement to advance concepts and frameworks of the Social Economy (SE) as a way to address increasing inequality of social, health, economic and ecological conditions, to provide alternative solutions to the perceived failure of neo-liberal dominated globalisation, and to address the weakening social capital of communities.

Promotion of the Social Solidarity Economy (RIPESS) in which many of the regional, national and international networks convene; and the *International Centre of Research and Information on the Public, Social and Co-operative Society* (CIRIEC)¹ with partners in Argentina, Austria, Belgium, Brazil, Canada, France, Germany, Italy, Japan, Portugal, Spain, Sweden and Turkey. Salamon et al. (2000), from the John Hopkins University states this shift is

“prompted in part by growing doubts about the capability of the state to cope on its own with the social welfare, developmental, and environmental problems that face nations today, a growing number of political leaders and community activists have come to see such civil society organizations as strategically important participants in the search for a middle way between sole reliance on the market and sole reliance on the state” (p.1).

Globally, the Social Economy has evolved not only as a third sector that exists alongside the private and public sector, but as an approach encompassing initiatives in most sectors of society (Quinones, 2009). While the term Social Economy first originated in France, its relevance and spirit is widespread, recognized with three guiding principles: co-operative enterprises, mutual benefit societies, and nonprofit associations (Defourny et al., 1999). Chavez & Monzon (2007) describe these organizations as

“intertwined expressions of a single associative impulse: the response of the most vulnerable and defenceless social groups, through self-help organisations, to the new conditions of life created by the development of industrial capitalism in the 18th and 19th centuries” (p.11).

Only recently have these organizations attracted serious attention in policy circles. As a consequence, basic information about these organizations—their numbers, size, activities, economic weight, finances, and role—has therefore been lacking in most places, while deeper understanding of the factors that contribute to their growth and decline has been almost nonexistent. This has hampered civil society sectors’ ability to participate in the significant policy debates now under way and its potential for contributing to the solution of pressing problems.

In Europe, the impact of the Social Economy is significant, particularly in the UK, France, Belgium, Spain and Sweden (Neamtan, 2005). The United Kingdom’s advanced enabling environment for the SE for example, exists largely to address social, economic, cultural and environmental issues at the community level (HRSDC, 2006). In some cases these countries

1 CIRIEC: <http://www.ciriec.ulg.ac.be/index.htm>

“have put legal frameworks in place for these enterprises, instituted financial supports, provided tax incentives for investment, established departmental units dedicated to social enterprise or community-based organizations, and specified that consideration be given to social enterprises in government procurement strategies, etc” (HRSDC, 2006; p.5).

In Latin America, and particularly in Brazil, the Solidarity Economy has responded to poverty and social exclusion through collective management and by creating worker co-operatives of marginalized populations, among other successful strategies (Santos, 2006). *The Brazilian Solidarity Economy Forum (FBES)*, initiated in 2003 has been particularly successful in instituting public policy for the sector, becoming a dominant force in economic and social development. In Canada, major Social Economy networks (*the Canadian Co-operative Association, the Canadian Community Economic Development Network, Chantier de l'économie sociale, Conseil québécois de la coopération et de la mutualité, the Conseil Canadien de la Coopération, and the Canadian Social Economy Research Partnerships*) are providing evidence to government of the opportunities to build a stronger, more equitable economy that tackles poverty, social exclusion and equality.

There are numerous policy initiatives internationally, as will be presented in this review, that can provide solutions to some of the urgent problems linked to poverty, such as hunger (food banks, soup kitchens, collective kitchens), homelessness, violence (shelters, support groups, etc.), and social exclusion (enterprises d'insertion or reintegration enterprises, employment-related training, etc.). There is a clear indication that momentum is building in support of the SE and that communities in many countries are being enabled by their governments *“to build the capacity to adjust, to improve self-reliance and responsibility, to identify their assets and to seize opportunities”* (HRSDC, 2006, p.5). Currently, there exists economic activity that embodies social values in every corner of the globe, even if these initiatives do not consciously identify as members of a Social Economy movement. Despite global debates about the theoretical concept of the Social Economy, *“its practice is everywhere engaged in and, in important ways, has always been with us”* (McMurtry, 2009).

Events such as the *World Social Forum*², which first took place in Porto Alegre in 2001, where the Social and Solidarity Economy were important themes, documents that the Social Economy is firmly inscribed in an international momentum for an alternative globalization. The eighth edition of the World Social Forum took place in Brazil's Amazon region in January 2009, where civil society leaders and activists from around the world came together. The Declaration from this Assembly points to the urgent need for the,

² World Social Forum: <http://www.fsm2009amazonia.org.br/what-the-wsf-is>

'construction of a radical alternative that would do away with the capitalist system and patriarchal domination'...and work towards 'a society that meets social needs and respects nature's rights as well as supporting democratic participation in a context of full political freedom³.'

The contemporary models of economic monopoly – state and private capital – have long been the solution for societies throughout the world of control over political and economic resources, and has since been heightened by globalisation. There is clearly a strong case for the development of an alternative economic order, and this is evidenced by the successful policies, initiatives and programs benefiting communities around the world.

This paper begins with a description of the various components of the Social Economy, and attempts to illustrate its scope and significance to socio-economic development and environmental sustainability on a global scale. The literature review (section 3) is separated geographically (North America, Europe, Latin America and the Caribbean, Asia and Africa), looking at how the Social Economy framework is being utilized as an effective tool supporting this movement.

1.1 Components of the Social Economy

Although there is debate about the conception and understanding of the Social Economy, there has been some consensus in the literature about the varying components that occupy this sector. It is often broadly addressed as an array of organizations with a social mission including nonprofits (including voluntary organizations), mutual associations, co-operatives, community economic development corporations and social purpose businesses (Neamtan, 2005; Allard & Matthaei, 2007). Poirier (2008) and others (see McMurtry, 2009) caution about the many challenges faced in defining the Social Economy, and which enterprises are consistent with all or some of the principles. Socially Responsible Investment (SRI) funds, for example, integrate principles of social and environmental criteria, although 90 percent of Fortune 500 companies are included in SRI fund portfolios including Coca Cola, Wal-Mart and Monsanto. It is indeed important, Poirier (2008) argues, to continue having discussions and debates in order to work together in aligning with the principles of the Social Economy.

In Ninacs (2002) review of the *Theory and Practice of Social Economy / Économie Sociale in Canada*, a useful conceptual amalgamation is provided of the theoretical models that distinguish organizations belonging to the Social Economy from all others. Figure 1 illustrates how these characteristics interplay, and includes co-operatives, mutuals, credit unions, social enterprises,

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³ WSF declaration: http://www.forumsocialmundial.org.br/noticias_01.php?cd_news=2557&cd_language=2

foundations and charities, and nonprofit organizations as components of the Social Economy.

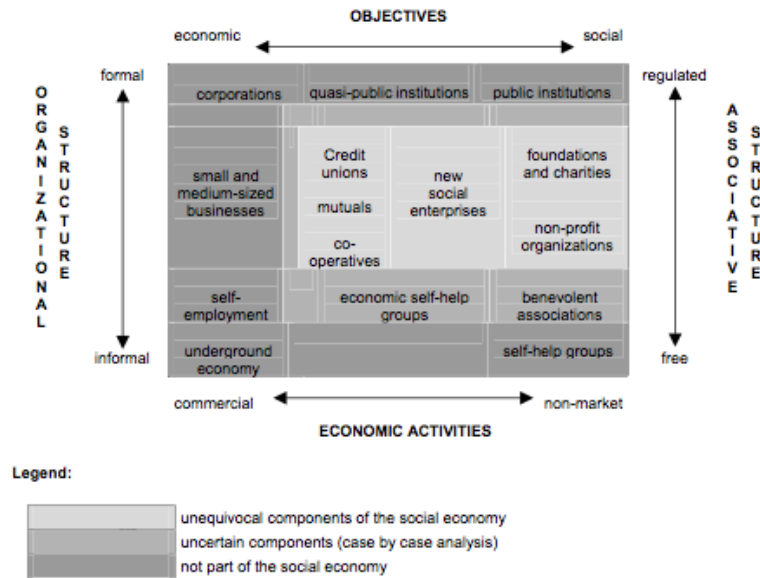


Figure 1. The Social Economy Quadrilateral. Source: Ninacs (2002).

Although this model serves for an interesting dialogue, there are some elements omitted that the literature points out. Some would argue for example, that the informal underground economy (excluded in Figure 1) is very much a part of the Social Economy, providing significant value to the economy, and often used as a survival strategy by the poor and unemployed (Beall 2000; Ackerman & Mirza 2001). Notably among the most influential work on the informal economy is Hernando de Soto’s *The Other Path* (1986), in which he argues that excessive regulation in the Peruvian economies forced a large section of the work force into informal economic activities. There is an emerging recognition that eradicating the informal economy through deterrence (levels of punishment) is unrealistic (Williams & Windebank 1995; Beall 2000). Formalizing the informal sector and supporting the goal of full employment is therefore increasingly discussed in economic development literature (Williams 2005; Mansoor 1999; Medina 1997). Integrating the informal sector into community-based and social enterprises, co-operatives and unions is becoming a widely used approach in Mexico (Medina, 2003), Columbia (Moreno-Sanchez & Maldonado, 2006) and Brazil (Gutberlet, 2005).

Community wealth based on social value, known as ‘social capital’ is well accepted in the literature as an element of the Social Economy (Neamtan, 2002). Peredo & Chrisman (2006) highlight social capital and positive social networks as useful concepts in understanding community-based enterprises,

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and are seen as necessary components for economic development. It is within these networks that “communities are able to build strong relationships, which, over time, allow trust, cooperation, and a sense of collective action to develop among members” (p.314). Putnam (2000) also confirms that through the development of enterprises and economic activity, which privileges solidarity from the ‘ground up’, citizens affirm their will and capacity to be effective entrepreneurs.

Quarter et al., (2001) illustrates a broader framework in Figure 2, representing the relationship between the Social Economy and civil society, and the relationship of these two entities to the private and public sectors. Here, they demonstrate that these categories are sub-components of society and that they interact and influence each other. They describe the Social Economy as consisting of three components:

“market-based co-operatives (primarily with shares) and commercial nonprofits; publicly oriented nonprofits; and most important, mutual associations (including non profit mutual associations and co-operatives without shares)” (p.370).

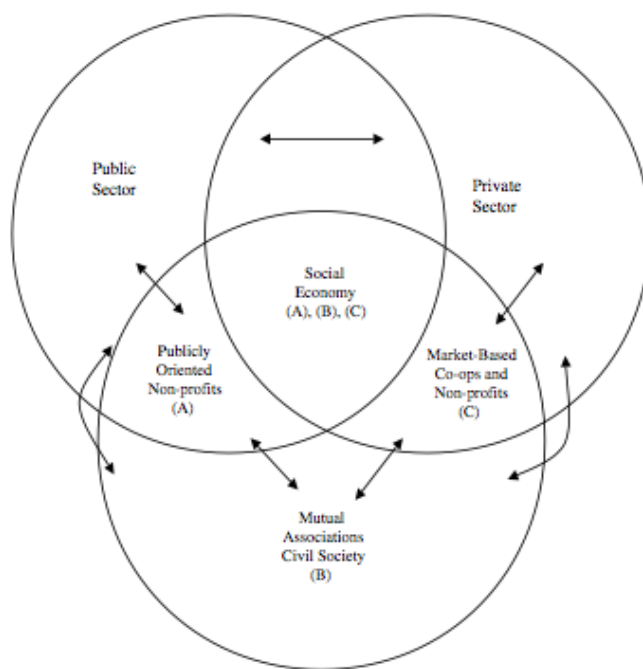


Figure 2. The Social Economy and Civil Society. Source: Quarter et al., (2001)

This study suggests that member-based organizations, be they nonprofits or co-operatives, have much in common, and that may also be because they serve a similar social function in helping people who are alienated by the structures of modern societies to reconnect with each other. Given the various facets of entities and structures that contribute to the socio-economic development of communities, there is no doubt to be challenges in reaching consensus among practitioners and governments around the world of what constitutes the Social Economy. The following is a description of some of the components highlighted in the literature that are recognized to be part of, or contributing to the Social Economy.

Co-operatives

The International Co-operative Alliance (ICA)⁴ defines a co-operative as “an autonomous association of persons united voluntarily to meet their common economic, social, and cultural needs and aspirations through a jointly-owned and democratically-controlled enterprise.” ICA has established seven co-operative principles: voluntary and open membership; democratic member control; member economic participation; autonomy and independence; education, training and information; cooperation among co-operatives; and concern for community. Globally, co-operative organizations operate in all sectors of activity, employ more than 100 million people, and have more than 800 million individual members.

There is a copious amount of literature devoted to the meaningful role co-operatives play in uplifting the socio-economic conditions of their members and their local communities (DFID, 2005; Thériault et al., 2008; Macpherson, 2009). Faced with global unstable economic systems, insecurity of food supply, growing inequality worldwide, rapid climate change and increased environmental degradation – the model of co-operative enterprise has become increasingly compelling. When examining the percentage of a country’s GDP attributable to co-operatives around the world, the proportion is highest in Kenya at 45 percent, followed by New Zealand with 22 percent. Co-operatives account for 80 to 99 percent of milk production in Norway, New Zealand and USA; 71 percent of fishery production in Korea, 40 percent of agriculture in Brazil; 25 percent of savings in Bolivia; 24 percent of the health sector in Colombia; 55 percent of the retail market in Singapore, 36 percent in Denmark and 14 percent in Hungary (ILO, 2007). In 2006, Brazilian co-operatives exported 7.5 million tons of agricultural products for a value of USD 2.83 billion to 137 countries⁵. Co-operative banks, in the form of credit

⁴ ICA: <http://www.ica.coop/al-ica>

⁵ Brazil-Arab News Agency, 2 February 2007: <http://www.anba.com.br/ingles/noticia.php?id=13698>

unions, play an important role in times of economic crisis as often they display prudence and avoid excessive risk-taking, focusing primarily on the needs of their members.

The International Labour Organization (ILO) (2007) recommends the need to promote the business potential of co-operatives so they can contribute to sustainable development and equitable employment. They also advocate for an institutional framework in which government registers co-operatives as simply and efficiently as possible, regulates them in the same way as other forms of enterprise, and provides a wide range of support such as human resource development, access to credit, and support services for marketing – all without infringing co-operative autonomy. In his analysis of the ICA's Identity Statement of co-operatives, MacPherson (2000), while acknowledging this development, stresses that much remains to be done in order for co-operatives to demonstrate their validity in the contemporary world. He points to the important responsibility that co-operative educators play

*“to ensure that the movement’s intellectual reservoirs become deeper; that its capacity to speak to people about the most important contemporary issues is enhanced” and that their role “be central to the continuing and deepening discussion of where co-operatives fit within the social economy of modern life”.*⁶

Mutual Associations

Dueck (2007) describes mutuals as a distinct form of economic organization that serves to provide a unique function in the Social Economy. These *mutual nonprofits* or *mutual interest associations* have the common feature of a membership who elect a board of directors or an executive that is responsible for representing their interests (Quarter, 1992). Mutual associations are similar to co-operatives in their membership structure, voting arrangements, and their general orientation of serving the interests of their members. They are associations of people, often of common religious or ethno-cultural heritage, based upon a common bond to satisfy their social needs. The European Commission Enterprise and Industry differentiate mutuals from co-operatives by the fact that they operate with their own, collective and indivisible funds, and not with share capital.⁷ The European Union Mutual Act identifies six features of a mutual: solidarity of membership, freedom of membership, absence of share capital, nonprofit making objectives, user-controlled democratic governance, and independence. Dueck (2007) applies these features in his

⁶ On Matters of Co-operative Identity: <http://web.uvic.ca/bcics/research/speeches/2000-Sep-AceArticle.html>

⁷ Enterprise and Industry: http://ec.europa.eu/enterprise/entrepreneurship/craft/social_economy/soc-eco_mutuals_en.htm

historical description and analyses of mutuals in Canada and highlights the legal challenges and limitations that must be recognized in building a common mutual foundation and framework.

Credit Unions

Credit unions are democratic, member-owned financial co-operatives. These associations provide members the opportunity to own their own financial institution and can help create opportunities such as starting small businesses. As not-for-profit co-operative institutions, credit unions use excess earnings to offer members more affordable loans, a higher return on savings, lower fees or new products and services. According to the World Council of Credit Union's (WOCCU)⁸ 2007 Statistical Report, the global credit union sector reported significant growth in 2007. This report, representing data from 96 countries, revealed that 49,134 credit unions serve an estimated 177 million members within those countries. WOCCU promotes the sustainable development of credit unions and other financial co-operatives around the world to empower people through access to high quality and affordable financial services.

Nonprofit Organizations

Laville (1998) identifies two distinct dynamics at work within the third sector: the first he associates with the Social Economy and is based on a tradition of self-help, understood as the practice of working with others to solve a common problem; and the second he relates to the custom of helping others in need upon which the practices of nonprofit organizations are based. Although Salamon *et al.*, (2003) do not identify their work as being situated within the Social Economy, their research on civil society organizations provides an additional perspective on this sectors contribution towards socio-economic development. Their research titled '*Global Civil Society: An Overview*', provides a broad picture of the civil society sector in thirty-five countries spanning all six continents. They identify nonprofits as a distinctive set of institutions - as an identifiable social "sector." The inclusion of the civil society as being a component of the Social Economy is highly contested despite the complimentary elements that it encompasses.

The number and variety of these civil society organizations has grown enormously in recent years, culminating in what Salamon et al. (2003) are calling a "global associational revolution" - a massive upsurge of organized private, voluntary activity in virtually every region of the world. These

⁸ WCCU: <http://www.woccu.org>

organizations enable effective social change, “stimulate citizen activism; awaken gender, environmental, and ethnic consciousness; and prompt heightened interest in human rights” (p.2). These structures also contribute significantly to building social capital, whose bonds of trust and reciprocity are found to be critical preconditions for democracy and economic growth.

The *UN Nonprofit Handbook Project*, administered by the John Hopkins Center for Civil Society Studies, seeks to improve the visibility of the nonprofit sector in national economic statistics by promoting the global implementation of the United Nations *Handbook on Nonprofit Institutions in the System of National Accounts* (2003). This handbook is the first comprehensive comparative assessment of the size, structure, financing, and role of the nonprofit sector at the global level. The aim of the Handbook is to respond to the growing interest that statisticians, policy makers and social scientists have in organizations that are neither market firms nor state agencies. These social institutions are variously referred to as “nonprofit”, “voluntary”, “civil society” or “non-governmental” organizations and collectively as the “third”, “voluntary”, “nonprofit” or “independent” sector. Types of organizations commonly included under these terms are sports and recreation clubs, art and cultural associations, private schools, research institutes, hospitals, charities, religious congregations and faith-based organizations, humanitarian assistance and relief organizations, advocacy groups and foundations, and charitable trusts.

Nonprofits are attracting increased attention from policy makers, as highlighted in the handbook, who have been searching for ways to improve the quality of public services and reduce the size of the state. Initiatives have been launched in the United States, the United Kingdom, France, Italy, Canada, the Netherlands, Germany, Australia, New Zealand, Japan, Chile, Pakistan and the European Commission, among others, to promote nonprofits or change government’s relations with them.

The voluntary sector, often included within nonprofits (religious, charitable, artistic and cultural, public education and lobbying, sports, trade etc.) is also argued to be a significant contribution to the Social Economy (Hall et al, 2007; Fairbairn, 2004). In Canada for example, there are over 161,000 nonprofit and voluntary organizations, with annual revenues of \$112 billion, employing over two million people (Imagine Canada, 2003). These organizations report a total of 19 million volunteers collectively contributing more than two billion hours of volunteer time per year (equivalent to approximately one million full-time jobs).

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1.2 Scope and Significance of the Social Economy

The literature reveals a growing interest in theory and practice of the significance of the Social Economy as contributing to socio-economic development. This trend is occurring around the world as governments and civil society begin to appreciate the benefits of this model for sustainability. Although environmental sustainability is a significant element of this alternative economy, there is limited literature that specifically discusses the environmentally beneficial outcomes of this framework. As an attempt to fill this gap, the following section (2.1.2) will briefly explore some of the literature on alternative economic models for environmental sustainability (such as ethical or green business, fair trade, alternative energy etc) and highlight some of the public policies contributing to support this growth.

1.2.1 Socio-economic Development

The 1995 *World Summit for Social Development* (WSSD)⁹ marked an important moment, when the citizens and governments of the world agreed on the principles of equity and social justice as the objectives of development. In February 2005, a large group of stakeholders, including governments and civil society organizations, met to follow-up and review progress on the commitments made at the WSSD. This meeting highlighted the growing international consensus about the synthesis between social and economic development. Other global Social Economy initiatives include the *International Labour Organization's* (ILO) *STEP*¹⁰ (Strategies and Tools against social Exclusion and Poverty) program of the Social Security Department focusing on the poor and excluded populations in the informal economy and the rural sector. STEP works in two inter-connected fields: the extension of social security in health, and integrated approaches to fight against social exclusion at the local level. STEP's work on the development of community based social protection schemes (such as micro insurance, mutual health organizations, etc.) has been hailed as a promising perspective for poor populations excluded from formal systems in particular in the least developed countries. The *Commission for Social Development* (CSocD)¹¹ is a commission of the *Economic and Social Council* (ECOSOC) of the United Nations, and is the principal organ to coordinate economic, social, and related work of the 14 UN specialized agencies, functional commissions and five regional commissions.

The empirical data on the size and scope of the SE globally highlights the

9 The World Bank: <http://web.worldbank.org/WSITE/EXTERNAL/TOPICS/EXTSOCIALDEVELOPMENT/0,,contentMDK:20761071~pagePK:210058~piPK:210062~theSitePK:244363,00.html>

10 ILO: <http://www.ilo.org/public/english/protection/secsoc/areas/step.htm>

11 United Nations: <http://www.un.org/esa/socdev/csd/index.html>

relevance of this sector. At the CIRIEC conference in 2007, Salamon, from the John Hopkins Centre for Civil Society Studies, describes the scale of nonprofit activity internationally. Using data from 40 countries around the world, Salamon (2007) equates that this sector contributes to \$1.9 trillion in operating expenditures, 48.4 million full-time jobs, and serves 4.6 percent of the economically active population. According to the 2006 CIRIEC study, paid employment in co-operatives, mutual societies, associations and similar organizations in the European Union totaled 11,142,883 persons in 2002-3 (the equivalent of 6 percent of the working population of the EU): out of these 70 percent are employed in nonprofit associations, 26 percent in co-operatives and 3 percent in mutuals.

Comparatively, Salamon et al. (2003) found that civil society organizations employ ten times more people than the utilities and textile industries, five times more people than the food manufacturing industry, and about 20 percent more people than the transportation industry in the thirty-five countries reviewed (see Figure 3).

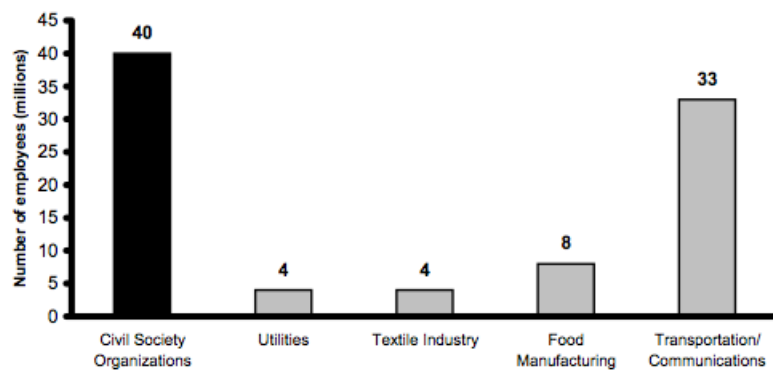


Figure 3. Civil Society organization employment, 35 countries (Salamon et al., 2003)

Social Economy enterprises in the EU are present in almost all sectors, such as banking, insurance, agriculture, craft, various commercial services, and health and social services etc¹². Significant in Belgium, for example, the nonprofit sector was responsible in 2001 for providing 66 percent of social services, 53 percent of sports and recreation, and 42 percent of health services.

Helen Haugh, Director of the MPhil in Management Programme and University Senior Lecturer in Community Enterprise at the University of Cambridge, highlights the significance of the sector in the UK, with an estimated 870,000 civil society organizations in UK, assets of £210 billion and total income of £116 billion. Haugh (2009) includes co-operatives, charities, voluntary and community organizations, mutuals, nonprofit organizations, community businesses, social and community enterprises as components of the SE.

12 EU: http://ec.europa.eu/enterprise/entrepreneurship/craft/social_economy/soc-eco_intro_en.htm

1.2.2 Environmental Sustainability

There is emerging literature highlighting how the Social Economy can be a vehicle for environmental sustainability. Despite the lack of reference to the term ‘Social Economy’ within this body of work, the concepts and principles are embedded in this framework. Often using terminology such as ‘green or ethical business’, ‘ecological economics’, or ‘social entrepreneur’, literature from a variety of disciplines reveal research on the economy-environment relationship (Johnson, 1998; Costanza, 1998; Daly, 2005) attesting to growing interest in business models that are creating goods and services that generate ecological, social and economic value – which are the foundation of the Social Economy. Daly (2005) argues that the traditional capitalist system is ecologically unsustainable and that developing an economy that can be sustained within the finite biosphere requires new ways of thinking. Notable works such as Hawken’s (1994) ‘*Ecology of Commerce*’ and McDonough & Braungart’s (2002) ‘*Cradle to Cradle*’ also outline the environmentally destructive aspects of many current business practices, and offers the vision of businesses adopting new practices to promote environmental restoration.

In what Soots & Gismondi (2008) refer to as an ‘eco-social crisis’, they point to the Social Economy as a way to address the severity and complexity of environmental challenges. They argue that there is a need for,

“more reflection...in particular the organizational and operational forms and practices needed to move toward regulating ecological resources, reinstating democracy, and reclaiming sustainable futures” (p.1), and explore how the Social Economy offers *“organizational practices and forms of mutuality, trust and democracy that could help a transition to sustainability”* (p.1).

The International Labour Organization¹³ also recognizes the significant contribution that the Social Economy can make to mitigate environmental challenges. In the context of climate change and rising food costs, they highlight how co-operatives, particularly in rural areas around the world, are reducing carbon emissions and promoting sustainable development in general. They point to examples of dairy farming in India, eco-tourism in Costa Rica, wind farms in Denmark and coffee plantations in Africa - all operating within co-operative models and contributing to poverty reduction and improved working conditions. Gutberlet’s (2009) recent work on the Solidarity Economy in Brazil also highlights how recycling co-operatives are using micro credit schemes for collective commercialisation, resulting in improved resource-recovery and recycling opportunities as well as increased wages for the recyclers.

13 ILO: “Confronting Climate Change”: How co-operatives contribute to meeting today’s challenges: http://www2.ilo.org/dyn/media/slideshow.curtainUp?p_lang=en&p_slideshow_id=18

2.0 Literature Review: International perspectives on an alternative economy

The following section is a review of literature highlighting the significant contributions made by governments around the world in support of the Social Economy. Some of these contributions include changes to the regulatory frameworks within which SE organizations operate including: the introduction of a range of funding approaches supporting the delivery of government-defined services to creating investment funds; and expanding the range of organizations that can provide public services. The following section outlines, geographically, the various policy initiatives being developed and implemented by governments around the world, and some of the benefits to communities that result.

2.1 North America

The literature reveals significant examples of how Civil Society Organizations (CSOs) across North America are applying innovative strategies to successfully combat socio-economic decline and reverse destructive local processes in order to move toward a healthier setting for living and working. There is also a lot of debate and analysis on the Social Economy as an emerging framework for socio-economic development and environmental sustainability (for example: Bradford, 2004; McMurtry, 2009). In Canada, and particularly Quebec, there has been progress made in advancing the Social Economy with an increasing network of actors who are committed to placing the SE on the political agenda. Organizations such as the Canadian Community Economic Development Network (CCEDNet) and the Chantier de l'économie sociale in Quebec have become strong proponents of this alternative economic approach. In the United States, although not as prominent as in other parts of the world, the Solidarity Economy is gaining strength, particularly as the weaknesses of the current economic system are revealed.

2.1.1 Canada

The Social Economy (SE) is a fairly new concept in Canada that describes a diverse and evolving combination of nonprofit and voluntary organizations and enterprises that have been producing and delivering goods and services in communities across Canada for well over a century (Neamtan & Downing, 2005). Despite this history, there is varying understanding and dispute of the Social Economy within academic, practitioner and government circles across Canada, particularly in defining the sector (Smith & McKittrick, 2008; Sousa & Hamdon, 2008), and which components and activities are included

(Shragge, 2004). These discrepancies are reflected in the uneven development of the sector across the country, in the literature, and in the claims of a ‘unified’ Canadian Social Economy (McMurtry, 2009). The experience in Quebec (discussed in more detail in the following section) is well represented in the literature and recognized by the provincial government as a valid and important sector. Practitioners and academics such as Vaillancourt (2009), Levesque (2007), Loxley & Simpson (2007) and Mendell (2008) for example provide a reflective, historical and comparative sample of works on the development and unique role of the Social Economy in Quebec. Although this term has been used in Canadian literature for over a decade (McMurtry, 2009), it is only in the last few years that the Canadian federal government has made policy commitments to this sector.

Government literature has only recently discussed how the Social Economy is an emerging entity and its role in achieving public policy at the national level. A significant example is the Social Economy Initiative in 2003, resulting from a combining of interests by pan-Canadian Co-operatives, Community Economic Development and Quebec “*économie sociale*” organizations. Other significant steps include the creation of a federal Parliamentary Secretary to the Minister of Social Development with a special focus on Social Economy, alongside significant investments in 2004 for capacity building, the creation of patient capital funds, and community-university collaborative research related to the Social Economy. The 2004 Throne Speech of the Canadian government in conjunction with an allocation of over \$130 million for capacity-building and other enabling financial instruments had the potential to advance this movement in Canada. The Throne Speech stated:

“The government is determined to foster the Social Economy – the myriad not-for-profit activities and enterprises that harness civic and entrepeneurial energies for community benefit right across Canada. The Government will help create the conditions for their success, including the business environment within which they work”.

Unfortunately, under the new Conservative government in 2006, this dialogue has declined, and most funding to support Social Economy organizations was removed.

Despite this setback, in 2006 the *Canadian Social Economy Hub* (CSEHub)¹⁴ was formed to act as facilitator for the Canadian Social Economy Research Partnerships (CSERP), promoting collaboration among six regional research centres across Canada (Atlantic, Québec, Southern Ontario, Saskatchewan, Manitoba and Northern Ontario, Northern, and British Columbia and Alberta),

¹⁴ CSEHub: http://www.socialeconomyhub.ca/hub/?page_id=2

and creating opportunities and exchanges with international networks. CSERP, funded through the Social Sciences and Humanities Research Council of Canada (SSHRC)¹⁵ collaborates with practitioners, researchers and civil society through the regional centres and undertakes research that further understands and promotes the Social Economy tradition within Canada, and as a subject of academic inquiry within universities.

Despite successful regional cooperation among the research nodes, there is no common definition of the Social Economy in Canada; rather each node uses a distinctive local definition. It is through the National Hub, that a unified perspective and understanding of the Social Economy is facilitated (Smith & McKittrick, 2008).

The SE framework has often been argued as a means to contesting neo-liberal restructuring, and proposing an alternative to the limits and inequalities of a market-driven economy (Laville, 1994; Lévesque and Mendell, 1999). Organizations such as the *Caledon Institute of Social Policy*¹⁶, and the *Canadian Council on Social Development*¹⁷ have concluded that the links between social and economic policy are vital to fight poverty, ensure social and economic security, and achieve social justice (Caledon Institute, 2004).

Most of the literature discusses the organization of the Social Economy emerging from the Community Economic Development (CED) movement, where today, there are “networks of networks” across Canada that are organizing cross-sectorally, and are mobilizing support for regional and national Social Economy policy initiatives (Allard & Matthaei, 2008). It is through the growing networks across Canada (including the *Canadian Co-operative Association*, the *Canadian Community Economic Development Network*, *Chantier de l'économie sociale*, and the *Conseil de la coopération et de la mutualité*), representing thousands of co-operatives and community-based enterprises, that partnerships are forming with the Canadian government in the search for a stronger economy that promotes sustainable communities and poverty alleviation.

CCEDNet¹⁸ defines Community Economic Development (CED) as “*action by people locally to create economic opportunities and enhance social conditions on a sustainable and inclusive basis, particularly in and with those communities and people that are most disadvantaged*”. Many actors view CED as a long-term empowerment process that builds the capacity of communities to help themselves using an integrated approach that recognizes social, economic, cultural and environmental goals (Neamtan & Downing, 2005; Moral & Jurado, 2006). It

15 SSHRC: <http://www.sshrc-crsh.gc.ca>

16 Caledon Institute: <http://www.caledoninst.org>

17 Canadian Council on Social Development: <http://www.ccsd.ca/home.htm>

18 The Canadian Community Economic Development Network (CCEDNet): <http://www.ccednet-rcdec.ca>

...it is the ‘symbiosis between social movements, CED activities and relatively progressive provincial governments’ that have positioned the Social Economy as a creative solution to a variety of challenges.

is through these CED policies and frameworks that provincial and territorial governments across the country are advancing the Social Economy, particularly in Manitoba, Nova Scotia, and Ontario (CSC, 2008).

There is emerging literature that offers a comparative analysis of the Social Economy among Canadian provinces and other countries. Loewen (2009) for example, describes the different characteristics of social enterprise development in Manitoba, Quebec, Nova Scotia and the United States, as well as the interventions and supports that have contributed to their growth. This research also investigates the ‘continuum’ of social enterprise development, the merits of different models and the appropriate interventions. Loxley & Simpson (2007) also provide an in-depth analysis comparing CED policies in Manitoba and Social Economy policies in Quebec, describing many of the similarities, and the challenges facing both. They conclude that it is the *‘symbiosis between social movements, CED activities and relatively progressive provincial governments’* that have positioned the Social Economy as a creative solution to a variety of challenges. Comparatively, they argue that in Manitoba these elements are more fragile, where civil society has not been as cohesive in fighting neo-liberal policies. They present a case for a strong, active civil society coupled with cumulative achievements as necessary ingredients in promoting a Social Economy agenda. Cabaj’s (2004) review of the Social Economy in Canada also describes a growing momentum in this sector and a survey of CED organizations in 2003 by CCEDNet concluded that 56 percent of organizations responding had been created in the last ten years and nearly a quarter in the last three years (Downing, 2004). Other indicators for growth and interest in this sector can be measured in the increased funding by foundations; most notably in the west by the Muttart Foundation, in Ontario by the Trillium Foundation, and across Canada by the McConnell Family Foundation. The Vancouver Foundation and VanCity Foundation for example, have invested in over 50 organizations seeking to start new social enterprises under their “Enterprising Non Profit” program.

Some of the literature pertaining to the Social Economy specifically discusses the non-market role as contributing to socio-economic development (Neamtan & Downing, 2005), while other groups of work investigate how specific sectors are contributing to the economy, such as the significance of co-operatives (Macpherson, 2009), nonprofit and voluntary sector (Hall et al., 2007). Also emerging are important works on public policy supporting the Social Economy by province (Brock & Bulpitt, 2007). The following section investigates the various components of the Social Economy in Canada within the literature.

Co-operatives

According to the Co-operatives Secretariat¹⁹, the co-operative sector is strong all over Canada with considerable support from the provincial governments. They reveal that Canada's co-operatives hold more than \$160 billion in assets; and non-financial co-operatives have annual total revenues of \$29.5 billion, and according to their 2004 study, there are 9,271 co-ops employing over 160,000 Canadians. Producer co-operatives support the livelihood of another half million Canadians, mainly in rural communities. Vaillancourt & Tremblay (2001) also point to the significant role of SE initiatives in the health and welfare field in New Brunswick, Ontario, and Saskatchewan specifically in the years preceding and following the advent of the welfare state.

A more recent study by Thériault et al., (2008) also revealed that co-operatives in Atlantic Canada have cumulatively well over half a million members, particularly in the financial sector. Their research found that a "typical" co-operative in the region has revenues of about \$437,000 and expenditures of around \$343,000, and that the cumulative number of employees (part-time and full-time) employed by the co-operatives in the survey is totaling over 6,800. They also found that practices of organizations are now extending relatively frequently into the reporting of social impacts (39 percent) but still relatively rarely into the reporting of environmental impacts (18 percent).

Nonprofits

Hall *et al.*, (2005) write about a vibrant nonprofit and voluntary sector in Canada, encompassing service delivery organizations in areas such as health, education, social services, community development and housing, as well as those that serve functions in arts and culture, religion, sports, recreation, civic advocacy, environmental protection, and through business, labour, and professional associations. This sector, according to their research, accounts for 6.8 percent of the nation's gross domestic product (GDP) and, when the value of volunteer work is incorporated, contributes 8.5 percent of the GDP. Organizations such as hospitals, universities, and colleges contribute to the remaining four percent of the nation's GDP. These organizations employ 12 percent of Canada's economically active population, and provide 13 percent of its non-agricultural employment.

Despite successes of a strengthening SE in Canada, there is consensus among actors that more can be done to enable this economy. McMurtry (2009) in particular, points to the need for a developed conceptualization of this sector in Canada supported with a policy framework for its development.

19 Co-operatives Secretariat Canada: http://www.agr.gc.ca/rcc-src/coop/index_e.php?s1=pub&page=soc

2.1.2 Quebec

The amount of literature coming out of Quebec is significant compared to the rest of Canada – where the SE as a defined sector is relatively new in the literature. Much of this literature discusses the Social Economy (L'économie Sociale) in Quebec as a distinct, culturally historic, and significantly pertinent element of the socio-economic and public policy development of the province.

Lévesque (2007), Vaillancourt (2008) and Favreau et al., (2004), in particular, all provide a detailed history of the Social Economy movement in Quebec over the last century. Lévesque (2007) refers to periods of 'cycles' or initiatives that are anchored in the local governments commitment to meet community needs during times of economic crises. He characterizes these various configurations in five great periods: a first, in the second half of the XIXe century, which could be characterized by the passage of a predominantly urban 'économie solidaire' to a predominantly rural Social Economy; the second, in the first half of XXe century, is in the form of a co-operative movement inspired mainly by corporatism and the social doctrines of the Church; a third, between 1960-1980, where the co-operatives, mutual insurance companies and associations adjust to the Quiet Revolution and take part in economic nationalism, which strengthens the notion of the "social co-operatives" and of associations; a fourth, in the turning of the XXIe century, with the search for alternatives to new challenges, in particular the employment crisis and the limits of traditional intervention, in the context of globalisation inspired by neo-liberalism; and a fifth between 1990-2008 described as a formal recognition of the Social Economy by both civil society and political bodies. The passage from one configuration to another, he argues, was generally preceded by the incapacities of the first to take up the new challenges. This transition gave place to marginal experiments, which became thereafter structured in a socio-economic form of regulation, and the emergence of a new development model.

Neamtan (2003) also discusses the historical development of this sector, highlighting the *Women's March Against Poverty: for bread and roses*, launched in 1995 organized by the Quebec Federation of Women (*Fédération des femmes du Québec*), as a critical turning point for the Social Economy. She describes the significance of this movement in drawing the attention and interest of local government, which resulted in a commitment to inject 225 million dollars over five years into social infrastructure through the Fund against Poverty (*Fonds de lutte contre la pauvreté*). The *Comité d'orientation et de concertation sur l'économie sociale*, was also established at this time, as well as *Regional Committees of the Social Economy* (CRES). Through the *Conference on the Economic and Social Future of Quebec* (Conférence sur le devenir social et économique du Québec) in 1996, emerged the *Chantier de l'économie sociale*, a taskforce comprised of women's groups, community organizations, the co-operative movement,

the labour movement, the national movement, youth groups, and employer representatives.

Principles of the Social Economy have thrived in Quebec, recognized by government policies and well accepted in all spheres of society and within the international movement. Over the last six years, thousands of Social Economy enterprises have been created (Neamtan, 2005), generating over 20,000 new and permanent jobs, many of which have been filled by people who were otherwise excluded from the job market, as well as the tens of thousands of jobs which have been integrated into the Social Economy through daycare centers, information technology, community media, social tourism, leisure activities, and proximity services, among others. This shift can be attributed to what Neamtan (2003) refers to as the ‘rediscovery’ of social capital in the late 1980s and 1990s on the policy lexicon, acknowledging the critical necessity of social cohesion for a well-functioning market economy. The consolidation of the *public and mixed economy model* during this time led to the emergence of what is called ‘the new Social Economy’, marked by the creation of civil society initiatives including: citizen’s committees, food banks, community centers, family economy co-operative associations, community health clinics, legal clinics, not for profit childcare centers and the creation of Québec’s network of local community service centers (CLSCs), that offered both health and social services at the local level throughout Quebec.

Another important strategy for advancing the Social Economy in Quebec, and around the world, is through co-production. Vaillancourt (2008) provides a comprehensive review of co-construction and production of public policy in the SE in Quebec and Latin America and argues,

“the democratization and enhancement of public policy requires participation by collective and individual stakeholders from the market and civil society in its creation (co-construction) and its application (co-production)” (p.12). He stresses, “the contribution of co-production to the democratization of public policy stems less from the number of stakeholders from the third sector present in this policy than from the quality of the relations created between the state and the third sector” (p.20).

In a more recent article, Vaillancourt (2009) highlights cases of co-production involving participation by the third sector in the South (Bresser & Cunill, 1998; Bifarello, 2000; Ndiaye, 2005; Vitale, 2005; Batley, 2007) and the North (Vaillancourt & Laville, 1998; Lewis, 1999; Pestoff, 2006). Cunill (2004) refers to this process of cooperation as *solidarity-based co-production*.

Ninacs (2002) highlights the particular cultural, political, and especially

economic contexts of Quebec society as playing a significant role in the development of the Social Economy in Canada. Levesque & Ninacs (2000) also attribute the prominence of this economy compared to the rest of Canada due in part to the weak capitalist structures of French-speaking Quebec and the social climate of consensus and commitment. They provide five elements typical of this configuration: (1) recognition by all stakeholders of the potential of the social economy for local development and job creation; (2) adoption of a relatively consistent development strategy, at least for some sectors, that combines government financial and technical assistance with continued autonomy of these businesses and organizations; (3) importance of sectoral consolidation and local governance; (4) recognition of the social economy as a full component of the economy; and (5) a diversity of institutional forms.

Marie J. Bouchard, a research director at the *Centre de recherche sur les innovations sociales* (CRISES)²⁰ and chair holder of the Canada Research Chair on the Social Economy at the Université du Québec à Montréal (UQAM), contributes significantly to the discourse on social innovation within the Social Economy, and on making its role more democratic. She has contributed to building the inventory of the French language literature on co-operatives in Canada (Bouchard et al., 2003). She has also designed an evaluation framework for the Social Economy (Bouchard et al., 2005). Bouchard, as well as other researchers at CRISES, conceptualizes social innovation at three levels; the first, through collective actors and social relations, analyzing how actors participate in new development paradigms; the second, through institutional innovations, where systems of rules and responsibilities are analysed; and third, organizational innovations through the analysis of the division and co-ordination of labour, modes of management, methods of co-ordination and social interactions. Mendell (2003) also describes the prominence of the SE in Quebec as,

“a history of political alliances” where the “architects of the social economy have radicalized oppositional strategies significantly by contesting the dominant paradigm through practice, by challenging existing institutions through the creation of new ones that work, by creating networks of citizens engaged in the social economy that speak with one voice despite the many sectors they represent” (p.2).

The governments commitment to the SE has been well documented. Between 2003 and 2008 it contributed \$8.4 billion to the Social Economy through various ministries in social services (\$6.1 billion to family services, \$331,7 million to health and social services, \$589,2 million in social housing); economic development (\$241 million in innovation and development, \$346,7 million in employment, \$10 million to the Chantier de l'économie

20 CRISES: <http://www.crisis.uqam.ca>

sociale, \$10,9 million investment in public-private partnerships, \$50,000 for the social enterprise development); the environment (\$6,7 million in waste management and recycling); transportation (\$334,3 million to extend services to persons with handicaps, and rural transport); and the arts (\$13,4 million in community media) (MAMR, 2008). Quebec's commitment to the Social Economy is further expressed in the creation of the *Office of the Social Economy* within the Ministry of Regional and Economic Development in 2003. Other supports include:

- Legislative framework and policy;
 - Integration of SE into rural development policy;
 - Sectoral policies for entrepreneurialship: childcare, homecare, social housing, recycling etc.;
 - Clientele-oriented policies and programs: handicapped, social integration through training, youth etc.;
 - Developing a framework for new enterprise models (solidarity co-operatives);
- Support for networks and regional infrastructure organizations;
- Recognition of the SE through partnerships with organizations;
- Loans and loan guarantees for collective enterprises;
- Fiscal and direct measures to support financial intermediaries; and
- Support for co-operative enterprises.

The federal government also supports SE organizations in Quebec through the Labour Market Development Agreement, delivering funds at the local level through local Employment Centres. The *2006 Summit on the Social and Solidarity Economy*²¹, held in Montreal concluded that the SE has become a strong movement and economic actor in Quebec. Neamtan (2008) attributes this success to strong networks, as well as innovation in research, policy, training and investment tools.

2.1.3 United States

The literature emerging from the United States is significant in discussing some of the components of the Solidarity Economy (such as the nonprofit sector), and has only recently produced some analysis around the SE as a unique concept and approach to socio-economic development and environmental sustainability. Allard & Matthaei (2007) point to a trailing in the development

21 Summit on Solidarity and Social Economy: <http://www.cedworks.com/files/pdf/free/MW190408.pdf>

A recent publication by the Social Enterprise Initiative of Harvard Business School, states that there are currently 1.5 million nonprofits and other social ventures with total revenues of \$700 billion in the U.S (Mendell, 2008).

of a Solidarity Economy in the US compared to the rest of the world, although highlight the first US Social World Forum in 2007 as an important impetus in mainstreaming this sector and leading to the US Solidarity Economy Network (USSEN)²². The USSEN identifies the Solidarity Economy as grounded in principles of: solidarity, mutualism, and cooperation; equity in all dimensions (race/ethnicity/ nationality, class, gender, LGBTQ); social well-being over profit and the unfettered rule of the market; sustainability; social and economic democracy; and pluralism, allowing for different forms in different contexts, open to continual change and driven from the bottom-up.

Miller (2005) outlines that in the US the definition of the Solidarity Economy is widely contested. For some, he argues, it refers to a set of strategies aimed at the abolition of capitalism; while for others, it names strategies for ‘humanizing’ the capitalist economy—seeking to supplement capitalist globalization with community-based “social safety nets.” Although the Solidarity Economy is not a common term used in the US government model and despite the dispute over what the concept entails, there are numerous SE practices that stand out in the literature that are substantial in size and scope.

A key component and concept that is central to the SE that has a lot of presence in the literature is social enterprise and entrepreneurship. The *Social Enterprise Alliance* (SEA) describes social enterprise as any earned income business or strategy undertaken by a nonprofit to generate revenue in support of its charitable mission²³. The Nonprofit Enterprise and Self-sustainability Team (NESsT)²⁴ uses the term “civil society organizations” (CSO) to refer to the wide diversity of not-for-profit, non-state and community based organizations and groups that advance the collective good. These organizations are also referred to as ‘nonprofit’, ‘nongovernmental organizations’ (NGOs), ‘charities’, ‘voluntary organizations’ etc. Poirier (2008) provides a picture of the nonprofit sector, which includes 1.4 million organizations accounting for 5.2 percent of the nations GDP and 8.3 percent of wages in the country. She points to other indicators such as significant increases in Fair Trade²⁵, Community Supported Agriculture (CSA), and complimentary currency systems.

Salamon & O’Sullivan (2004) also reveal the results of a survey conducted by the Civil Society Studies on nonprofit organizations in the US. The survey documents the effects of recent economic struggle and government budget cuts on charitable organizations and assesses how the organizations have responded. The results show that American nonprofits have become, in many cases, highly

22 US Solidarity Economy Network: <http://populareconomics.org/ussen/node/14>

23 Social Enterprise Alliance (SEA): <http://www.se-alliance.org>

24 NESsT: <http://www.nesst.org>

25 2005 Executive Summary Fair trade in North America: http://www.equiterre.org/equitable/pdf/2005_FTF_Trends_Report.pdf

entrepreneurial organizations, responding actively and creatively to new fiscal pressures. Nearly two-thirds of these organizations have managed to expand their activities of at least 10 percent or more in response of growing demand, despite these fiscal pressures. A recent publication by the Social Enterprise Initiative of Harvard Business School, states that there are currently 1.5 million nonprofits and other social ventures with total revenues of \$700 billion in the U.S (Mendell, 2008).

McKnight & Kretzmann (1993) at the Institute for Policy Research (IPR) at Northwestern University point out that applying *Asset-Based Community Development* (ABCD), rather than the traditional needs-based approach, can facilitate successful community development in the US. They describe this alternative approach as one that recognizes that it is the capacities of local people and their associations that build powerful communities. They go on to say that by municipal agencies “stepping back”; communities shifted from being “consumers” of services to “designers” of community programs, and, finally “producers” of community. Mathie & Cunningham (2002) highlight the similarities of the ABCD approach to that of the *Sustainable Livelihoods* approach developed by the Department of International Development and the United Nations Development Program (UNDP). Both of these strategies grew out of a concern that simply promoting income-generating activities was not synonymous with enhancing livelihoods of the poor. Mendell (2008) also stresses that a ‘*systems thinking*’ approach should be applied to understanding the social, political and economic impact of social enterprises.

2.2 Europe

Not only is there significant literature and research emerging on the modalities of the Social Economy in Europe, but there is also significant government representation in the literature on how the SE can be used to achieve policy objectives. The scope and size of policy instruments, fiscal commitment and public engagement in support of the SE reflects the EU’s position in addressing current socio-economic conditions. This commitment is largely attributed to the many countries in the European Union with national boards explicitly responsible for matters relating to the Social Economy.

The most recent conceptualisation of the Social Economy in the EU is that of the *Charter of Principles of the Social Economy* promoted by the *European Standing Conference on Co-operatives, Mutual Societies, Associations and Foundations* (CEP-CMAF), created in November 2000 (Chavez & Monzón,

2007). In January 2008, the CEP-CMAF changed its name to *Social Economy in Europe* (SEE)²⁶, and includes members of co-operatives, mutual societies, associations and foundations as well as new forms of businesses that share the values defined in Social Economy Europe's Charter of Principles.

The term Social Economy is not unambiguous among all the countries in the Union, but usually co-exists with other terms and similar concepts. According to a recent study by CIRIEC²⁷ (2008), countries with the greatest acceptance of the concept are: France, Italy, Portugal, Spain, Belgium, Ireland, and Sweden. In France and Spain, the SE is recognized in law. Countries with a medium level of acceptance of the concept include: Cyprus, Denmark, Finland, Greece, Luxembourg, Latvia, Malta, Poland, and the United Kingdom. In these countries the term co-exists with other concepts such as the nonprofit, voluntary and social enterprises. Countries with limited or no recognition of the term SE include Austria, Czech Republic, Estonia, Germany, Hungary, Lithuania, the Netherlands, and Slovenia.

The CIRIEC study "*The Social Economy in the European Union*", prepared for the European Economic and Social Committee (EESC)²⁸ in 2007 by Chavez & Monzón is a conceptual and comparative study of the situation of the Social Economy in the European Union and its 25 member states. This report provides an exhaustive view of the SE, highlighting the quantitative and qualitative importance of the Social Economy sector in the European Union in economical and social terms (with over 240,000 co-operatives economically active in 2005, providing employment to 3.7 million people and services to 143 million members). The various Social Economy Enterprises summarized in the report work to combine job creation, quality of employment, economic growth, social link, competitiveness, development of territories and the creation of social capital.

Ninacs (2002) attributes the success of the sector to the supporting innovative forms of economic and social activity through legal frameworks that facilitate social entrepreneurship: the Italian parliament was the first to introduce the "social solidarity co-operative" in 1991; Belgium followed in 1995 by creating a legal form for a company set up for "social purposes"; Portugal introduced the status of social co-operatives with limited liability in 1999. In a comparative study of co-operatives in Spain, Italy, and Quebec (Canada), Adeler (2009) also demonstrates that the level of development that the sector achieves is directly correlated to the nature of the supportive environment, the strength of the sector infrastructure, and government commitment toward enabling

26 Social Economy Europe: <http://www.socialeconomy.eu.org>

27 International Centre of Research and Information on the Public, Social and Co-operative Economy (CIRIEC) website: <http://www.ciriec.ulg.ac.be>

28 The full report is available at: <http://www.socialeconomy.eu.org/spip.php?article420>

the development of this environment and infrastructure through policy, programming, and funding.

Klevan & Walsham (2008) acknowledge the role of the UK government in the development of social enterprise as a model for maximizing public good through business solutions; in defining social enterprises as businesses that trade with a social and/or environmental purpose operating across an incredibly wide range of industries and sectors, from social care and recycling to fair trade and farmers markets and “*whose surpluses are principally reinvested for that purpose in the business or in the community, rather than being driven by the need to maximize profit for shareholders and owners*” (HRSDC, 2006, p.5). Amin et al., (2002) also discuss the important role of social enterprises in contributing to overcome social exclusion in the UK. Mendell (2007) re-affirms the significance of the Social Economy particularly in the United Kingdom, and hails the government’s commitment to social enterprise development and community-based initiatives. She points to the *Social Enterprise Unit*, established in 2001, which is now integrated into the Office of the Third Sector within Cabinet, and the numerous innovative programmes including a fiscal framework promoting social investment, as promising examples for other countries.

There are also examples in the literature of Social Economy enterprises delivering public services in the EU. Bode & Evers (2004) highlight Germany, where although government manages policy analysis and funding, social services are often run by nonprofit organizations. Defourney (2001) also points to other EU countries that are exploring new ways of co-management, where responsibilities are shared among governments, for profit providers and third-sector organizations. Evers and Laville (2004) argue that these movements are linked to a range of political and economic ideas to create mechanisms for the production of wealth and welfare other than market exchange or state protection. They represent a wide spectrum of collective actions coming from civil society, based on various forms of solidarity.

Despite the tangible and ‘central presence’ of the third sector in Israeli economy and society, the concept has been absent in public policy discourse and academic literature and is not recognized as a distinct framework (Gidron & Katz, 2002). Nevertheless, Gidron et al., (2003) fill a valuable gap by defining and measuring the Israeli third sector, as well as providing a historical background and implications for public policy. This work and others (Gidron et al., 2008) point to an urgent need for new policy in the area of philanthropy, from both the general public and business sector. Adapting new policies, such as tax reforms for example, or by investing in research and innovation of non-profit organizations would significantly advance the sector.

2.3 Latin America and the Caribbean

There is a significant amount of literature highlighting the Solidarity Economy in Latin America and the Caribbean, and more recently evidence of increasing government policy development to use the SE as a way of addressing development challenges (Gutberlet, 2009). Arruda (2008) describes the Solidarity Economy as one of the most vibrant oldest histories in Latin America, which has been building as a response to profound social crisis, unemployment and social exclusion – primarily caused by the opening of the internal market and recessions. Resistance to corporate globalisation and neo-liberal policies, he continues, have led to social movements searching for viable alternatives. In a recent publication, Gutberlet (2009) also highlights the strengthening of the Solidarity Economy in Latin America as a response to inequality and exclusion, and demonstrates how instruments such as micro-credit for example can significantly contribute to livelihood enhancement, particularly to the informal sector.

Laurell (2000) points out that governments supporting these alternatives have been voted into power in Venezuela, Brazil, Argentina, Chile, Peru and Bolivia. Some examples of national commitment to the Solidarity Economy can be seen in *Venezuela's Ministry of the Popular Economy*²⁹, Brazil's National Secretariat for Economic Solidarity in 2003 and Argentina's *Mano a la Obra* program initiated in response to their devastating economic crisis in 2001. Initially conceived as a solution to the economic crisis, the Solidarity Economy in Latin America has proven to be a dynamic and sustainable economy supported by governments across the continent.

Paul Singer, National Secretary of the Solidarity Economy in **Brazil**, argues that under the form of cooperativism, Solidarity Economy has already existed for 200 years in practically all countries of the world (Gomes, 2005). A review of the extent of the Solidarity Economy in Brazil was conducted in 2005 by the government, and revealed that 15,000 democratic enterprises collectively employ 1,250,000 men and women. The development of the National organization called the *Brazilian Forum on Solidarity Economy* in 2003, representing a number of social enterprises, indicates the growing strength of the Solidarity Economy (Puntasen et al., 2008). The creation of this Forum coincided with the establishment of the *National Secretariat on Solidarity Economy*, a branch of the Ministry of Labour and Employment of the Federal Government. Through this joint collaboration, Brazil established an innovative legal framework governing the relationship between the Third Sector and the state, where creative innovations were introduced, such as the *parceria* (partnership) and *public-interest civil society organizations*.³⁰ The

29 Ministry of Popular Economy: <http://www.venezuelanalysis.com/news/698>

30 Latin-American perspectives on the Third Sector, <http://www.jhu.edu/~istr/networks/lac/LACperspectives.html>

Organização da Sociedade Civil de Interesse Público (Civil Society Organization on Public Interest) is recognized in Law as a new type of nonprofit legal entity. This nonprofit cannot distribute any income surplus, dividends, bonus and/or assets gained among any of its members or participants, advisors, directors, employers or donors. Rather, these assets are used to fund organization's activities and purpose.

Marcos Arruda (2008), socio-economist at the *Institute of Alternative Policies for the Southern Cone of Latin America* (PACS) in Rio de Janeiro, and member of the Facilitation and Coordination Committee of the *Alliance for a Responsible, Plural and Solidarity-based Economy* (ALOE) defines the Solidarity Economy as

“a system of socio-economic relations centered on the human being, its need to evolve, develop and fulfill its potentials, its work, knowledge and creativity; planned and managed democratically; and aimed at generating satisfaction of its material and non-material needs, rights and aspirations, including the right to a dignified life, a healthy environment and enabling conditions for the fulfillment of one's potentials and qualities; well being and happiness” (p.16).

Arruda (2008) continues by distinguishing between the Social and Solidarity Economy as,

“regarded more as a strategy than a system, promoting values and practices of higher ethical and human quality in three systems: public (directed to services and the orchestrated planning for development), private (directed to profit), and social (directed to the social and human goals of self-help, reciprocity and solidarity)” (p.20). He also combines the notion of intentionality with that of Solidarity Economy, “which foster decision-making motivated by value judgments about the use of factors of production of goods, services and knowledge, and about sharing the benefits of such production fairly, in terms of individual and household needs, as well as broader social needs...as citizens and members of a world political community in construction, the consciousness that we are responsible for the whole and not just for the part we belong to is what should guide our intentionality” (p. 23).

In **Venezuela**, grassroots and community initiatives, as well as aggressive government legislation, have established a variety of innovative practices and approaches that aim for a more democratic and participatory economy. The government has oriented its economic policies around the principles of “endogenous development,” as an alternative to the neo-liberal development model and has passed laws to strengthen the socialist transformation of the

country³¹. Through the *Popular Economy Law*, based on principles of a solidarity-based economy, local governments and public institutions are supporting the growth and development of this economy through procurement practices that favour co-operatives and small enterprises. As a result, the total number of co-operatives in 2004 was 945,517, up from 215,000 in 1998 (Harnecker, 2005). Bohmer (2009) points to substantial improvement in social indicators since 1998 as a result of the governments commitment to a 'socialist' economy: poverty and income inequality have declined sharply; indicators of health and access to education have substantially improved as have access to water and sanitation; the number of students in higher education more than doubled from the 1999-2000 school year to the 2007-2008 school year.

The *Grupo Red de Economía Solidaria del Perú* (GRESP)³² is an association composed of civil union associations, NGOs, religious organizations, international cooperation agencies based in Peru, and people that promote economic and associative relationships of solidarity in the economy. Nedda Angulo (2007), vice-president of GRESP, points to the development of GRESP through the organization and network of groups including: the National Council of Coffee in Peru, a group of 35,000 coffee producers; and the Central Artisan Organization in Peru, with 1,600 artisans. These groups are diversifying their activities and creating their own financial entities, including their own exporting companies. Angulo (2007) summarizes the,

“Solidarity Economy in Peru as a strategy that combines initiatives based on the individual or collective property of the means of production which facilitate access to welfare services and to the labor market, and which are fighting for the recognition of economic human rights and for the construction of the democracy in my country” (p.25).

Statistics have shown that at least 70 percent of jobs have been created through grassroots or small businesses, contributing to around 30 percent of Peru's GDP (Fretel, 2008).

Argentina also recognizes the Solidarity Economy as an initiative that requires participation by the state that must adopt measures that reduce the accumulation of capital in the dominant sectors of society (Giraldex, 2005). The *Mano a la Obra* program initiated in 2001 finances the development of labour co-operatives in many sectors, and is a particularly significant policy initiative supporting socio-economic development. Viviana Alonso (2005),

31 The Development of Venezuela's Popular Economy by Jan Ullrich, May 21st 2009: <http://www.venezuelanalysis.com/analysis/4458>

32 GRESP: <http://www.gresp.org.pe>

of the *Inter Press News Agency* in Argentina, highlights that there are many examples of organizations involved in economic activities whose chief aim is not maximising profits, which have horizontal structures, and are run in a democratic, participatory manner. Some of these experiences include regional co-operatives of small farmers, bankrupt factories that were abandoned or closed by their owners and reopened by their employees, self-managed companies, communities that have come together to find solutions to meet basic needs like health care, housing or food, and barter networks whose members trade goods and services. Since 2001, the government of Argentina has been supportive of worker co-operatives, and has recognized the sustainability of their employment and production. In Argentina, the worker co-operative model allows businesses to be exempt from income taxes, free of previous debt and have lower management costs.³³

In *Chile*, support for the Social Economy is gaining slowly and there have been some significant examples for developing co-operative organizations. Special assistance and subsidies, for example, are provided for housing co-operatives and co-operatives of street-traders. Additionally, co-operatives that distribute drinking water and electricity to rural areas receive technical, administrative, and financial assistance from the government.³⁴

Mexican support for the Social Economy has been advanced with the launching of the Federal Law for the *Promotion of the Activities Conducted by Civil Society Organizations*, enacted in 2004³⁵. This law recognizes the social interest of the activities of civil society organizations, and serves as a means for enhancing philanthropy, thereby promoting civil society participation in activities that seek to develop the country. Under this new law, an Inter-Ministry Commission has been created in order to design, implement and follow-up on the promotional activities of the government. Government support for Social Economy initiatives has been implemented in four major areas of activity: the *Production Development Fund*; the *Regional Development Fund*; the *Priority Groups Assistance fund*; and the *Social Investment and Community Development Fund*.

In *Cuba*, there are many examples of how the Solidarity Economy framework is benefiting socio-economic development and supporting advances in food security, agriculture, and job creation to name a few. Fretel (2008) outlines one example, which is seen in the recent entrepreneurial system, that has solidarity purposes, and is set up to restore the historical centre of Old Havana. The impact of this initiative was measured and revealed significant results to

33 Government of Canada, Co-operative Section, Agriculture Canada: http://agr.gc.ca/policy/coop/analysis_e.phtml

34 UN Report 2001: www.un.org/documents/ga/docs/56/a5673a1.pdf

35 International Centre for Non-Profit Law in Mexico: www.icnl.org/JOURNAL/vol7iss2/la_castro.htm

improving socio-economic development in the region. Between 1994 and 2004 for example, economic organizations in the centre generated profits of more than US \$80 million and created 10,000 jobs that benefited 60 percent of the local residents, 34 percent of whom are women.

2.4 Africa

The literature describing the Social Economy in Africa is mainly influenced from the development of the NGO sector. Müller (2004) discusses how nonprofit, civil society organizations, philanthropy, and voluntarism increasingly attract attention in Africa for their contributions to the challenges of poverty alleviation, development, environmental protection, and social exclusion. Despite the vital contribution these organizations make to social development in Africa, there has lacked comprehensive research, making it difficult to assess their role and development, as well as consequent regulatory public policy.

Nonetheless, there are a number of African countries that are committing to models of sustainable socio-economic development with priorities of peace and security, democracy and participation, governance, regional cooperation and capacity building. While in a lesser state of development in the Social Economy, some structures have been in place to support it. In terms of organization, Africa hosted the Third International Meeting on the Globalization of Solidarity in 2005, and the headquarters for the Intercontinental Network for the Promotion of the Social Solidarity Economy (RIPESS).

Some countries have also set up government bodies specifically assigned to developing the Social Economy such as Mali's Department of Economic Solidarity (HRSDC, 2006). RENAPESS (Réseau National d'Appui à la Promotion de l'Économie Sociale et Solidaire) is also a national network of the social and solidarity economy in Mali and plays an important role in advancing these development strategies. Incorporated in 2003, RENAPESS continues to promote, educate, and explore best practices in the Malian movement through discussion, exchanges, accompaniment, and advocacy.³⁶ Senegal has also committed to a vision that includes the following three main components: sustainable development, management of emergencies and disadvantaged groups and the creation of revenue-generating activities.³⁷ This vision is facilitated through the National Poverty Strategy (PRS) promoting services, improved living conditions for vulnerable populations and the generation of wealth. Also in 2003, the Nigerian government implemented the *National Economic Empowerment Development Strategy* (NEEDS), a program designed to provide a foundation for sustainable poverty reduction, employment

³⁶ CCEDNet: <http://www.ccednet-rcdec.ca/?q=en/node/927>

³⁷ Ministère de la Solidarité Nationale: www.solidarite.gouv.sn/ijourn%E9.htm

generation, wealth creation, and value reorientation.³⁸

The social enterprise model is an emerging concept in Africa and an attractive strategy by civil society actors to combat Africa's present socio-economic situation (Sesan, 2006). In many African countries this model is being pursued as a valued alternative to the grant-seeking model, while providing increased financial sustainability and retaining the values of the organization.

2.5 Asia and Pacific

In Asia and the Pacific, the literature reflects the use of the terms "People's Economy", "Compassionate Economy" or "Solidarity-based economy" - as a new but growing concept through the creation of forums and networks. The first Asian Forum for Solidarity Economy was held in Quezon City of the Philippines in 2007 where over 700 delegates from 26 different countries met to articulate a uniquely Asian solidarity economy as a people and eco-centered way of governance. Japan's first Solidarity Economy Forum³⁹ was also held in 2007, was comprised of mainly academics and activists, identified primarily within the co-operative sector. During these forums it was agreed to set up a network of Solidarity Economy stakeholders in continental Asia that could coordinate and provide direction to the mapping, documentation, and information exchange activities among the stakeholders called the *Asian Alliance for Solidarity Economy* (AASE). Quiñones (2009) describes the focal system of the AASE as consisting of four sub-systems: the creation of an International Institute of Solidarity Economy (IISE); an Asia-Pacific Solidarity Investment program (APSIP); an Asian Forum for Solidarity Economy (AFSE) serving as the Practitioners Forum of the alliance; and a AASE Web Portal.⁴⁰

Through this networking important strides were made such as the Bayanihan Banking Window (BBW), a facility that links socially responsible investors to socially responsible enterprises. The result is programs that generate micro-businesses and income, as well as housing and environmental improvements at the community level. By 2005, the Pasay zone of Manilla had 145 financial centres with 4,604 savers, 80 percent of them women (Arruda, 2008).

There are many ways that co-operative and solidarity forms of economic development are reducing or eliminating poverty and disparities in Asia. The *Grameen Bank* (GB)⁴¹ in Bangladesh for example, has one of the most established and recognized micro-credit programs in the world; it is a *banking system based*

Between 1994 and 2004 for example, economic organizations in the centre generated profits of more than US \$80 million and created 10,000 jobs that benefited 60 percent of the local residents, 34 percent of whom are women.

38 NEEDS: <http://www.enigeria.com.ng/downloads/partI.pdf>

39 Japan Solidarity Economy Forum: <http://www.socioeco.org/en/forum-solidarity-economy-japan.php>

40 AASE: www.aa4se.com

41 Grameen Bank: <http://www.grameen-info.org>

on trust, accountability, participation and creativity, providing poor people with credit without any collateral. This credit contributes significantly to reduce poverty and serves as a catalyst in the development of socio-economic conditions of the poor who have been previously excluded from banking systems. As of January 2009, the Grameen Bank has 7.71 million borrowers, 97 percent of whom are women. GB provides service in 83,744 villages, covering more than 100 percent of the total villages in Bangladesh. Other examples in **Bangladesh** include the development of rural electricity co-operatives, called Palli Bidyut Samities (PBSs), now serving 38,000 villages and recognized as one of the most successful electrification projects in the developing world (DFID, 2005).

At a recent symposium “*Social Enterprises Explore the New Encounter of Japan and Korea*” which took place in March 2009 in Tokyo, Hirota (2009) summarizes numerous socio-economic initiatives being developed in Korea that are serving the public good: including the creation of job opportunities for the handicapped, integrating marginalised young people, and business training for women. He argues that Korean social enterprises are similar to the ones in Europe.

In **Thailand**, the *Sufficiency Economy*, proposed by His Majesty King Bhumipol Adulyadej, is based on principles towards greater participatory democracy, greater equity and more secure environmental sustainability. The International Symposium on ‘*Sufficiency Economy, Participatory Development, and Universities*’ (SEPDU), held in Bangkok hosted a number of academic participants, and Thai grassroots organizations concerned with participatory resource management, empowering women, and co-operative production demonstrated how universities can learn from and contribute to such organizations.

Other examples in the Pacific include the Regional Partnerships program in **Australia** supporting the *Area Consultative Committees (ACCs)*, which are nonprofit, community-based organizations. There are 56 ACCs serving rural, regional, remote and metropolitan communities and are key regional stakeholders to building networks and partnerships to find local solutions (HRSDC, 2006).

3.0 Gaps in the Literature

The literature is still emergent on the Social Economy as a framework and distinct sector and how the components (i.e. nonprofits, co-operatives) work together to create socio-economic and environmental outcomes. This is limiting as it only discusses certain components, such as the nonprofit or co-operatives, (such as Salamon who values the nonprofit as part of the SE but excludes the co-operative sector) making it difficult to quantify the breadth and scope of the sector. There is also value in highlighting the fact that many nonprofits share similar concerns as other Social Economy organizations. Size can be

a crucial difference, but a supportive environment reflects the same needs of larger nonprofits as they do the smaller ones. Some examples where the SE is recognized as a distinct entity are shown in Quebec and Europe.

There is a general lack of literature about the Social Economy in African and Asian countries. Despite this, there are emerging regional and national networks (such as in Japan and Francophone Africa) and project websites that highlight the significance of this sector in socio-economic development. With continued interest in developing the SE in these countries, there will likely be a surge of literature emerging. Also missing are the experiences of grass-roots self help associations with often no status, such as squatters, or sometimes illegal status for example, that march and advocate for homelessness and equity.

There is some critical analysis of the role that the SE can play in contributing to further social exclusion and marginalization, but not a lot. Loxley and Simpson (2007) provide some critical concerns that where social services are devolved to Social Economy organizations, it could actually reinforce neo-liberalism. They argue that this could be a way of reducing public sector employment and wages, and help create cheap labour pools in the market that don't really influence the overall quality of conditions. There is also limited literature that present trade union perspectives, and their argument and concerns for how the Social Economy can undermine direct employment benefits and wage rights for example.

Methodological variations in the metric systems used to measure impacts and scales of the Social Economy create difficulty in discussing this sector as distinct (McMurtry, 2009). Some research coming out of the Canadian Social Economy Research Partnerships (CSERP) have attempted to combine comparable and aggregate data using similar methodologies looking at the nonprofit, and voluntary sector first and then applying this to the co-operative sector. Quebec is the only place that has done this since they have a SE framework that integrates these components in terms of size and significance (Bouchard et al, 2005). In order to convince the public, policy makers and practitioners that the Social Economy is well suited to alleviate poverty and social exclusion for example, concrete data and measurement indicators are needed to show how many jobs, and how much social capital is created. Despite Mook and Sumner's (2009) literary advancement to the measurement of the SE through *social accounting*, there has been limited attention paid to this area of work. Social accounting, they argue, can be an "*important tool for connecting sustainability and the Social Economy, for valorizing the civil commons, for encouraging sustainability, and for contributing to increased human and environmental well-being*" (p.20).

Despite some research on ecological conservation (Quiñones, 2009), research focusing on environmental sustainability and the links to the Social Economy are extremely undervalued in the literature. Although often mentioned as

an outcome of the Social Economy framework, rarely is there a systematic synthesis of how this is measured and the importance of including ecological perspectives in these policy discussions.

4.0 Conclusion

From the literature it is clear that there is a growing conceptualization of the Social Economy as a distinct framework for socio-economic development. There is an increase in analysis within academic circles, amongst civil society and at the governmental level of the significance of joining up the individual components of the SE (i.e. co-ops, non profit) as part of a distinct sector of the economy that contributes to critical social and economic outcomes. Internationally, there is more evidence of this trend in certain jurisdictions in Europe and Latin America.

The literature has highlighted Social Economy instruments that have enabled communities to respond to local challenges and develop innovative actions, while integrating values of solidarity and social justice. The development outcomes gained through the organizations and structures of this alternative economy appear to be significant.

Although not exhaustive, this literature review provides a picture of current international discourse on the public policy significance of the Social Economy. Key findings from the literature suggest that the SE is a major economic force, accounting for a significant share of global production of goods and services and employment and contributing to sustainable social and economic development. There is widespread recognition in the literature that the SE is a major vehicle for addressing intertwined and interdependent issues of social, economic, environmental and cultural well-being. Alongside this recognition is the growing discourse on the role that the SE plays in democratic participation and empowerment of women, indigenous people and other excluded groups in society, both in meeting their needs for sustainable livelihoods, and in increasing their power in democratic decision-making. The importance of SE actors engaging, with government support, in the process of co-constructing public policy is seen as a critical need for the SE to fulfill its full potential.

Countries where the Social Economy has flourished are those where “direct political responsibility has been assigned, and specific structures designated, to guide and implement the policy initiatives” (Neamtan & Downing 2005, p. 53). The literature suggests that the Social Economy can provide an innovative vehicle for: solving social and environmental problems, stable and sustainable economic growth, matching services to needs, promoting fairer income and wealth distribution, and strengthening economic democracy and citizenship.

Despite the contribution of the Social Economy to socio-economic development and environmental sustainability, there are still major constraints on the establishment, growth and sustainability of enterprises and organizations operating in this sector. There now needs to be analysis of the kinds of policy instruments and trends that are needed to support that role. The following paper in this three-part series will address this gap in compiling public policy instruments that civil society and government from around the world are revealing as significant to socio-economic development and environmental sustainability.

Key findings from the literature suggest that the SE is a major economic force, accounting for a significant share of global production of goods and services and employment and contributing to sustainable social and economic development.

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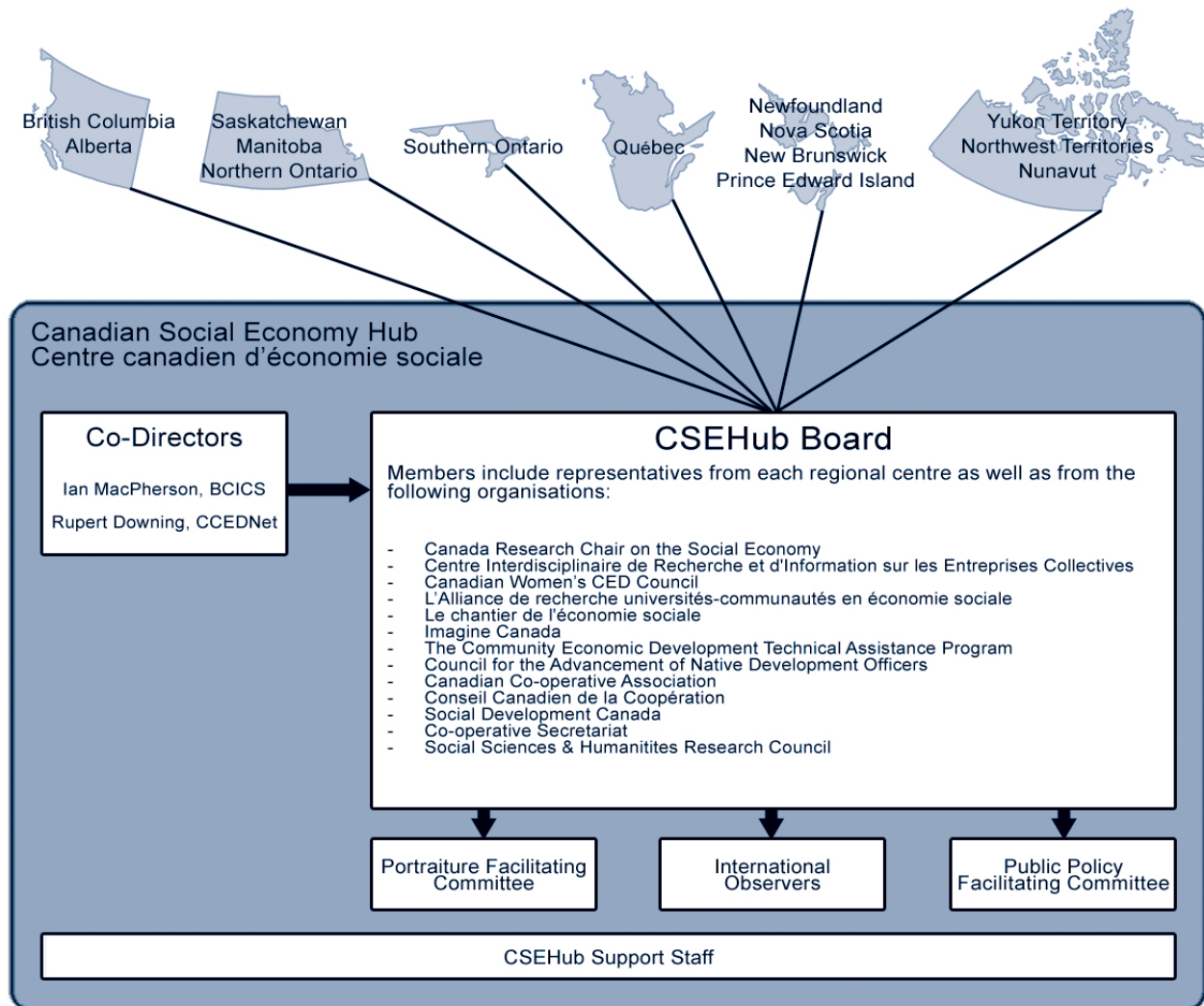
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