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The Social Economy: Approaches, Practices and a Proposal for a New Community-University Alliance (CURA)

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Abstract

This document provides an overview of selected theoretical and empirical approaches to define a research proposal for a new CURA (Community-University Research Alliance) on the social economy to be launched in 2005. The authors' goal is also to spark the interest of researchers in the social economy. With this in mind, the first section represents an attempt to provide a theoretical and empirical framework for the social economy, drawing on complementary concepts such as the third sector, where appropriate. In the second section, we emphasize the need for an inventory of innovative practices in the field and for statistics to quantify the activities of the social economy and the resources involved. In the third section, we identify the main research directions and questions based not only on our own knowledge but also on a review of the literature. In the final section, we make some suggestions as to how the specific nature of this new program will relate to the existing CURA program.

Diverse theoretical approaches to, and initiatives in, the social economy

While the concept of social economy is used to greater and lesser degrees in the different regions of Canada, the reality to which it refers is more widespread (Vaillancourt *et al.*, 2004; Bagaoui, 2002; Chouinard and Fairbain, 2002; Brown, 2002 and 1997; Vaillancourt and Tremblay, 2002 and 2001; Fontan and Shragge, 2000; Banting, 2000; Lévesque and Mendell, 2000; Leduc-Browne, 1999; Leduc-Browne and Landry, 1999; Lawson and Thériault, 1999; MacLeod, 1995; Watson, 1994; Douglas, 1994; Quarter, 1992; Lévesque and Malo, 1992). Over the last twenty years or so, there have been numerous civil society initiatives in many countries (with obvious differences in the North and in the South) in economic and social de

velopment, more often than not with government support (Brady, 2003; Evers and Laville, 2004; Comeau, *et al.*, 2001; Lévesque and Ninacs, 2000; Favreau and Lévesque, 1996; Laville, 1994 and 1992; Defourny and Monzón, 1992; Monzón and Barea, 1991; Defourny, *et al.*, 1999; Favreau, 2000). These socio-economic initiatives, which distinguish themselves from those associated with either the public or the private sector (hence the term “third sector,” used as a synonym for “social economy” in the Anglo-Saxon world), are increasingly being recognized for their capacity to achieve success in areas where the other two sectors have failed either individually or in combination (Economic Council of Canada, 1990; OECD, 1999).

A great diversity of socio-economic initiatives and initiatives

Theoretical and empirical references to the social economy¹ date back to the 19th century (Gueslin, 1997; Desroche, 1983; Chaniel, 2001), but the concept did not gain currency again until the last third of the 20th century. During the period of economic growth in the late 1960s, many so-called alternative socio-economic initiatives questioned the production centred economy. Expressions of this included proposals for self-management and a commitment to “small is beautiful” as viable and alternative ways of living and working (Brown, 1970; Meadows *et al.*, 1982; Schumacher, 1973; Lévesque *et al.*, 1989). Although the call for sustainable livelihood continued to grow during the last twenty years of the 20th century, the re-emergence of the social economy was strongly influenced by the crisis of the early 1980s and by the impact of globalization and the opening up of markets, economic restructuring, the rise of the knowledge-based economy as well as the social and political changes associated with the reconfiguration of the welfare state during this time and its inability to address social exclusion and the emergence of the new poor with appropriate policies (Boyer and Hollingsworth, 1997; Boyer, 1992; Castel, 1995; Castels, 2000).

The crisis and profound changes simultaneously led to *new opportunities and new needs* that would mobilize civil society actors and lead to a new-generation social economy.² Social innovations emerged both to respond to new, urgent social problems that especially affected certain communities and social groups and to meet the demands of new social movements – the community movement, women’s groups, environmental groups, local communities, cultural communities, and so on. In this context, the various types of associations that were formed (non-profit associations, cooperatives, mutual societies) generally reflect the search for new relationships with

¹ The term “social economy” dates back to the second half of the 19th century, when it referred to a different approach to the economy (see Gide, Weber, Durkheim, Walras) as well as to a number of socio-economic initiatives including cooperatives, mutual societies and mutual benefit societies (Desroche, 1983).

² Canada-wide, the Canada Customs and Revenue Agency register showed that, on January 1, 1999, there were 77,368 charitable organizations. Over the last thirty years, the number has been growing by about 2000 annually (Dreesen, 2001:14). While they do not all belong to the social economy, the rising number of such organizations reflects the new energy of civil society.

the State and the market and the need for new regulations and a new division of labor worldwide (Evers and Laville, 2004; Pestoff, 2004).

At an even more practical level, the new social economy includes new personal services to meet needs that have either been met inadequately by the welfare state or not at all (in general predominantly non-market-based activities) and new economic activities (often predominantly market-based activities) to promote the integration of excluded people or to revitalize rural and urban areas in decline or abandoned (Fontan *et. al.*, 2003). We refer to market-based and non-market-based activities to show that, whatever their legal status, all the initiatives involve a broad range of resources: (a) non-market, non-monetary resources that are made available by the reciprocity fostered by associations of people (volunteer work and gifts); (b) non-market resources associated with redistribution such as subsidies and fiscal advantages provided by public authorities in fulfilling their social mission; and (c) market resources from the sale of products or from the coverage by members of part of the costs of the goods or services concerned (*e.g.*, seven dollars a day for childcare centres in Québec). Because of this capacity to mobilize a broad range of resources, some analysts refer to the social economy as a “plural” economy (Laville, 1994) or one based on several logics (market, civic, industrial, domestic, inspiration- and project-based approaches) (Enjolras, 1995).

Table 1: Four broad categories of social economy organizations and enterprises

Relationship to the market	Needs and opportunities	
	The social economy (response to urgent social needs)	The social economy (response to new opportunities)
The predominantly non-market-based social economy (social development)	Examples: Shelters for the homeless Collective kitchens Reintegration of school dropouts	Examples: Daycare centres Perinatal centres Eco-museums
The predominantly market-based social economy (economic development)	Examples: Training businesses Readaptation centres Popular restaurants (soup kitchens) Community-based investment funds Development funds	Examples: Social enterprises Worker cooperatives Natural food cooperatives Organic farming Recycling

Source: *Lévesque, 2003.*

Table I clearly shows that the new social economy has developed primarily in two areas: (1) as a strategy to combat poverty and social and occupational exclusion, where initiatives respond to urgent social needs and critical social situations; (2) the creation of new wealth, where initiatives respond not only to needs but also to new opportunities in which neither the market nor the State are effectively engaged, if at

all. Both areas have spawned at least four major types of social economy organizations. Both cases – responses to urgent social needs or to new opportunities – include non-market and market dimensions, the former more generally associated with social and cultural development, the latter more closely associated with economic development. In other words, the responses to urgent social needs and to opportunities include both social and economic development objectives; however, predominantly non-market-based initiatives tend to be identified with non-profit associations while those that are predominantly market-based can be found in non-profit organizations, cooperatives or mutual societies. In addition, there are many support and advisory organizations and sectoral and regional networks. In Québec, the Chantier de l'économie sociale has been providing a governance framework for all sectors in the social economy since 1996 (see www.chantier.qc.ca).

On the ground, organizations and actors have established criteria for identifying who is part of the social economy, based on the legal status of organizations, their values (*e.g.*, solidarity) and their principles and rules (*e.g.*, one person, one vote). The *legal status* used most often by organizations considered to be part of the social economy is the non-profit organization (NPO), the cooperative or the mutual society. There is general agreement that their legal status makes it easier for organizations facing similar challenges to form associations, but this does not ensure uniform practices. Social economy organizations producing goods and services (*i.e.*, engaged in economic activities in a substantive way) must be working explicitly in the public interest (when serving those who are not members of the organization) or for the collective interest (when bringing together members, similar to how self-help organizations function) – and this is not always automatically the case. Furthermore, they are supposed to operate independently of the State and the private sector (hence the concept of the third sector). This means that the social economy organization must be controlled by a voluntary association of persons (the origin of the expression “voluntary organization”), not by public or private funders (Dreesen, 2001:11). In social economy organizations, democratic practice and autonomous management are just as compelling criteria as non-profit status, if not more so.

The *principles and values* of the Chantier de l'économie sociale are based on a consensus among social actors that is more present in Québec than in other parts of Canada. The concept of social economy adopted in Québec can be summarized as follows:

- The ultimate goal of service to members or to the collectivity;
- Autonomous management (thereby excluding associations and organizations under the control of the State or an external entity);
- Democratic decision-making (thereby excluding an entity such as NavCanada, for example, which is a non-profit organization but which does not make decisions through a democratic process);
- The primacy of people and work over capital in distributing power and proceeds;
- Individual and collective participation, control and responsibility.

With a few minor exceptions, this way of characterizing the social economy in Québec, parallels what has been observed in other countries, especially in instances where the social economy is clearly of interest (Dreesen, 2001:11-12; Making Waves, 2004; Conseil Wallon de l'Économie Sociale, 1990; Monzón and Barea, 1991).

The definition of the social economy adopted by actors is the result of compromise – with the State, among others – and is therefore not accepted without reservation, debate and even opposition. Depending on their (collective) interests and political vision, social actors and movements tend to broaden the definition so that it encompasses their own activities, while others try instead to narrow its scope in order to highlight their differences (Kearney *et al.*, 2004). If we take Québec as an example, the women's movement proposed a broad definition of the social economy so as to include community action, *i.e.*, initiatives to reduce poverty or increase social awareness and build solidarity (David, 1997; Ninacs, 2000:144). At about the same time, the community movement demanded that autonomous community action be clearly differentiated from the social economy so as to be able to hold on to public funds allocated to popular education and the defence of social rights (Québec, 2001). In a more fundamental way, these actors feared that, by becoming involved in activities with a strong entrepreneurial thrust, they might be forced to contribute to a process they opposed – the commercialization of day-to-day living. The fear that charitable organizations would be commercialized (Zimmerman and Dart, 1998) and that voluntary action would be dependent on the State was expressed in other parts of Canada as well (Hall *et al.*, 2001). And so the social economy also asks social actors a *political question* on the relationship between civil society initiatives, the State and the market (Lévesque, 2003a). To some extent, such a question is inevitable, given the great diversity of actors involved and of social economy initiatives, but for researchers it is also a *research question* (which therefore involves designing a research framework).

An analysis of the social economy requires that we distinguish very clearly between those organizations producing goods and services and those defending and advocating social rights: the former are located principally within *the economy* in its concrete production of goods and services (that also include non-market, non-monetary activities), while the latter are principally engaged in *politics*, trying to influence the authorities through raising awareness, advocacy and lobbying (Schmitter, 1992). However, since neither the economic sphere nor the political sphere are impermeable, especially in the case of economic organizations dependent on the mobilization of human resources, there are, in fact, many hybrid cases.

Diverse theoretical approaches on the social economy

The renewed popularity of the concept of social economy in Europe³ in the mid-1970s is due in large part to the efforts of Henri Desroche and Claude Vienney to theorize the common characteristics of cooperatives, mutual societies and associations by drawing on a tradition that was over one hundred years old. They found social economy organizations to be more complex than other forms of organizations and enterprises, in that they combine an association of persons with a goods or service producing entity in a dual relationship of productive activity and membership (Vienney, 1994).

For such a complex relationship to be maintained in spite of the considerable potential for conflict, an appropriate legal status and specific rules must be established. The legal status of organizations (cooperative, non-profit, mutual society) forms the basis for the first definition of the social economy. This definition allows one to quickly identify organizations facing similar challenges. However, there is no guarantee that practice will necessarily follow the rules. Moreover, not all organizations that feature similar characteristics, share the legal status that underlies this first definition of the social economy. Accordingly, Desroche added the concept of “uncertain characteristics” reflected in community enterprises, trade union enterprises, communal enterprises and public enterprises under the control of a democratic authority (Desroche, 1983:205).

A *second definition* proposed by Claude Vienney goes one step further in that it is a systemic definition characterizing the social economy in terms of *actors* (actors who are relatively dominated and thus affected in their daily lives and activities), of *activities* (socially necessary activities that both the State and the market have failed to deliver, or have delivered inadequately), and of *specific rules*, of which there are at least four governing: (1) the relationship between members (democratic practices); (2) the relationship between members and the enterprise or producing entity (determination of activity by members); (3) the relationship between the enterprise and members (distribution of surplus); (4) the enterprise or goods/services-producing entity as such (sustainable collective ownership). In this definition, the social economy cannot be confused with the informal economy or the domestic economy (Lévesque *et al.*, 1989:9-52).

These two definitions were challenged by a new generation of researchers who, from the early 1990s on, proposed *several other definitions* to reflect, among other things, the new generation of organizations and collective enterprises (Laville, 1992; Evers, 1995; Pestoff, 1995 and 1998; Favreau and Lévesque, 1996; Lévesque *et al.*, 1999). On the one hand, the researchers adopted an approach combining *micro* (en-

³ In France, the first social economy platform was developed in 1977 by Henri Desroche at a conference of the Comité national de Liaison des Activités Mutualistes, Coopératives et Associatives (CNLAMCA). In November 1978, a preliminary seminar on the social economy in Brussels gave the debate a European dimension (Desroche, 1983).

terprise or organization) and *macro* (State and institutional context) dimensions; on the other, they tried to redefine the economic and political dimensions of the social economy. In so doing, they link the emergence of a new-generation social economy to the crisis of Keynesian regulation (market-state), to the reconfiguration of the welfare state and economic restructuring, as civil society established itself as a complementary force to the State and the market [Evers and Laville, 2004; CRISES (Centre de recherche sur les innovations sociales) and CRIDA (Centre de recherche et d'interventions sur le développement et l'autonomie)]. In this analysis, the social economy is defined not only as economic activity with a social purpose but also as activity based on a new, broader concept of the economy and politics (Dacheux and Laville, 2004).

Instead of considering the economy from a formal neo-classical perspective (rational calculations in a context of scarce resources and unlimited wants), they draw on the ideas of Karl Polanyi (1944) and define the economy from a substantive perspective, that includes three economic principles or patterns of integration – “market,” which uses market resources; “non-market,” based on redistribution primarily by the State; and “non-market and non-monetary,” based on reciprocity and the gift in which civil society engages voluntarily (Mendell, 1996). In this perspective, the social economy organization is distinguished both by its capacity to combine a greater diversity of resources than other types of organizational forms (hence the term “hybridization”) and by its commitment to collective goals and democratic practice (hence the term solidarity-based economy).

Researchers in this school define the social economy as: (1) a *plural economy* because of the plurality of principles and resources mobilized (seen as a solidarity-based economy to differentiate it from earlier approaches) (Roustang *et al.*, 1997); (2) an integral part of a *mixed economy of social welfare*, to situate the social economy as an intermediary space between the private sector, the State and the domestic economy, thus highlighting both its socio-economic and its socio-political dimensions (Evers and Laville, 2004:15); (3) a *third sector* which, although separate from the State, private enterprise and the informal domestic economy, overlaps with each of them because of their blurred boundaries (Pestoff, 1998). In short, while the social economy can be defined as a plural economy, a solidarity-based economy and a mixed economy of social welfare, it is also seen as an integral part of a “new system of governance of the public interest” in which the resources of the State (through its agencies), the market (through private enterprise), and civil society (through voluntary associations, etc.) are mobilized in new ways (Enjolras, 2004). Thus the social economy is not a “sector of civil society”; it is part of a plural economy or mixed economy of social welfare.

As we have already stated, other concepts have been advanced as well to account for relatively similar experiences and initiatives. For example, *community economic development (CED)* has gained wide currency across Canada especially from the mid-1980s (Compfans, 1998; Fontan and Shragge, 1997; Broadhead, 1994; Hudson and Galaway, 1994; Boothroyd and Craig, 1993; Favreau and Ninacs, 1993; Ross

and McRobie, 1989). Many publications and a number of university research programs have focused on community economic development, which is often defined as “a process by which communities initiate and implement their own solutions to economic problems to build long-term community capacity and foster the integration of economic, social and environmental objectives” (Ross and McRobie, 1989). CED gives priority to a holistic approach to economic development, in its commitment to business development as well as employability, to job creation as well as the social integration of excluded people, and to economic activity as well as to housing and proximity services. It also differs from traditional approaches to economic development in that it solicits civil society’s participation in such matters as local governance and the implementation of development tools to serve the community: local community development plans, community-based development funds, business service centres, and so forth. CED can be included as part of the social economy because it offers a form of governance that has the capacity to build solidarity between the many and diverse components of civil society as well as other stakeholders – business and government – within a specified territory (Fontan *et al.*, 2003; Morin *et al.*, 1994).

Another concept quite close to that of the social economy is “*social enterprise*,” which is increasingly referred to in the US, the UK and Europe (Bornstein, 2004; Eunson, 2003; Emerson, 2001; Brady, 2003; Harding and Cowling, 2004; Defourny, 1999). A social enterprise is one that has a social mandate (*social purpose enterprise*) targeting community development or the social needs of a specific social group. There seem to be two prevailing trends: one that is predominant in Europe (Borzaga and Defourny, 2001) recognizes the social dimension of largely market-based enterprises that do not necessarily enjoy the legal status required to belong to the social economy; the other one, which predominates in the US, includes non-profit organizations that are increasingly engaged in commercial activities or whose behavior is clearly entrepreneurial (Baldelt, 1997). Other research projects have focused on the profile of the social entrepreneur, a hybrid figure who is a cross between the entrepreneur and the social activist, highlighting the specific difficulties faced by this kind of actor, such as gaining access to financing and seeking integration into the business community (Lévesque, 2002; Badelt, 1997; Thake and Zadek, 1997).

The concept of the *third sector* is sometimes used by English-speaking researchers as a synonym for social economy.⁴ The concept includes non-profit organizations as well as mutual societies and cooperative enterprises that are engaged in market activities and redistribute surpluses to their members (Evers and Laville, 2004; Vaillancourt, 1999; Gui, 1992). At the same time, the concept is, in some cases, and particularly in the US, used to designate non-profit organizations, *i.e.*, a sector that is separate both from the State and from the market and is able to make up for the defi-

⁴ CIRIEC’s study on the social economy, directed by J. Defourny and L. Monzón (1992), bears the title *Économie sociale, entre économie capitaliste et économie publique* in French and *The Third Sector, Cooperative, Mutual and Nonprofit Organizations* in English.

ciencies of the market and the State and, *ipso facto*, cooperatives and mutual societies (Salamon, 1990; Salamon and Anheier, 1997; Weisbord, 1977). The two meanings of “third sector” – non-profit organization and social economy – reflect two quite different theoretical approaches and apparently different experiences. The NPO approach privileges the lack of a profit motive as the determining factor underlying voluntary organizations (thereby excluding cooperatives and mutual societies), while the social economy approach considers democratic practices and stakeholder participation as strategic factors.

Lastly, the concept of *social innovation* is associated increasingly with those of social enterprise and social economy. Social innovation may be defined as “any new approach, practice or activity and/or any new product that has been developed to improve a situation or solve a social problem” and which “has gained support among institutions, organizations and communities” (Bouchard, 1999; CST (Conseil de la Science et de la Technologie), 2000, 2001 and 2001a). In this sense, a social innovation is no doubt a social or socio-economic experiment, but it is one that is successful and can be generalized (Chambon *et al.*, 1982). For a social innovation to demonstrate its social utility, it can certainly be validated by the market, but it can also be validated through its institutionalization within the public sector and the social economy. Social economy organizations are more likely to act as vehicles for innovations than others because they most often emerge to meet needs not adequately satisfied by the market or the State, or to respond to new opportunities (Lévesque, 2002; Whyte, 1982; Zimmermann, 1999). Their system of governance and their integration in the community as well as their proximity to certain social groups permits more rapid identification of needs and opportunities than is the case for other organizations (Fontan, 1998). Yet associations and enterprises in the social economy seldom feel that they are innovating because they do so spontaneously. This is why it is important to identify and describe the innovations and study the conditions in which they emerge and are disseminated.

Inventory of best practices and international comparisons

Actors and researchers agree on the need for statistics that are as reliable and consistent as those produced by organizations such as Statistics Canada. A number of countries, including France and Spain, have undertaken work to create a satellite account for the social economy. Many attempts have reportedly been made to establish qualitative indicators to account for the social dimension of the economy, based on such models as the Human Development Index. In addition, there is a vast scope at the *micro* and *meso* levels for those wishing to document the broad range of social innovations and the operations of enterprises and organizations.

Inventory of best practices

Actors and researchers alike acknowledge the challenge of producing an *inventory of best practices in the social economy*. In particular, the large number and diversity of experiments across Canada reflect not only the specific geographical, socio-economic, cultural and historic characteristics of Canada's regions but also the diversity within regions. Both actors and stakeholders have underscored how important – indeed, how urgent – it is to highlight all these practices. The research required would strengthen the capacity of Canadians to unite around common goals such as the elimination of poverty, the adoption of collective socio-economic development strategies and the creation of socio-economic tools to achieve this.

The social economy and CED were developed in Canada as strategies of social transformation and innovation, with the cooperation of the State and often with the private sector. The involvement of the State has been acknowledged but the nature of this involvement is different as civil society actors and the State (various levels of government) are increasingly engaged in what we may call the *coproduction of public policy*. The resulting *socio-political innovations* such as, for example, personal services (joint management of services, waiving of user fees, etc.) result from negotiations between civil society actors and the State. Likewise, in the financial field (*e.g.*, worker/labor funds, community-based funds) and more broadly in solidarity-based financial practices, the State has become directly involved in capitalization or indirectly involved through fiscal policy (tax credits and advantages). The State is also active in certain intermediaries (new forms of governance) involving the various actors in civil society, as is the case of the Community Futures Development Corporations (CFDCs), Community Economic Development Corporations (CEDCs) and Local Development Centres (LDCs) in Québec. It is also directly or indirectly engaged through sectoral programs such as recycling (environmental business and daycare centres in Québec (Infanti, 2003; Mendell and Rouzier, 2004)). To sum up, a number of studies suggest that the social economy and CED have developed with the support of the State and that they are thus part of new forms of state intervention.

Two reports published in 2003 by the Canadian Community Economic Development Network (CCEDNet) identified five federal departments and four federal regional agencies involved in CED. The first report presents the results of a nationwide survey of 340 CED organizations (Chaland and Downing, 2003). The second presents an inventory of provincial CED commitments, which are quite significant but are focused on social and human capital rather than financial capital (Infanti, 2003). The survey's conclusion is not reassuring: with the exception of Manitoba, government support is by no means assured in the future. In addition, respondents identified the inadequate investment in funding for organizations and in training, learning, skills and leadership development, and capacity building as an obstacle. While achievements in the various provinces are comparable in many instances, the Québec experience is distinct because of its history, the level of engagement, the establishment of the Chantier de l'économie sociale (a network of networks of multi-

ple sectors of activity, social movements and unions), its coherence (social economy actors have gone beyond piecemeal innovations to build a genuine socio-economic development strategy), its high profile in Québec, across Canada as well as internationally, and its presence in the political arena. On the Canadian scene, CCEDNet affords significant opportunities for representation and comparative analysis that were not available in the past. The participation of over 600 people at a conference organized jointly by CCEDNet, the Chantier and ECOF-CDÉC in Trois-Rivières in May 2004, was a turning point for social economy and CED actors in Québec and in the rest of Canada.

The examples of social economy practices across Canada⁵ were selected to demonstrate their diversity rather than their exemplary or “best” practices on which we are unable to comment (the question of evaluation is still an open one). Yet, in spite of the impressive list of practices and achievements in Canada, there is still insufficient enabling public policy for civil society initiatives in either community economic development or personal services. The diversity of experiences demands public policy that is not only coherent but sufficiently flexible to reflect these differences. Thus an inventory and an analysis of practices have become indispensable for strengthening the social economy itself and for developing more appropriate public policy.

Among the Canadian examples we have identified organizations, associations, networks, and inter-sectoral and regional (provinces, regions, cities) intermediaries that have exerted and continue to exert a significant impact on their respective communities. These examples suggest that there is a large inventory of ways to implement alternative approaches to producing goods and services, based on the following:

- Development planning (neighborhood, urban, rural, regional, etc.) (*e.g.*, housing, reconversion of de-industrialized districts, etc.);
- Creation of new socio-economic development instruments and tools (*e.g.*, investment funds, land trusts);
- Employability and empowerment training for people excluded from the labour market (market integration enterprises and programs);
- Transformation of health and social services (control by actors in partnership with the State: homecare, daycare, mental health);
- Professional and technical training and mentoring to ensure viability of social enterprises (technical assistance, Community Economic Development Technical Assistance Program (CEDTAP));
- Construction of new public spaces (*e.g.*, CED entities and community associations).

The proposed inventory clearly reflects the role played by social movements (women’s movement, environmental movement, labor movement, etc.) and their considerable strength when they work together around shared goals. The impact of

⁵ To be obtained from the authors upon request.

their actions gains concrete expression in, for example, the emergence of new sectors of activity (*e.g.*, recycling and environmental businesses, social tourism, fair trade), changes in behavior (socially responsible investment, corporate social responsibility, voluntary simplicity, etc.) (Zald, 2004), and the development of new evaluation tools centred on needs rather than on outcomes (results) so as to include qualitative criteria in social audits, etc.

Some of the longstanding experiments that have exerted considerable influence on the social economy and CED in Québec and the rest of Canada are housing cooperatives, which not only provide low-cost housing but a social environment to foster integration; public daycare centres, which in many cases grew out of federal employment programs (*e.g.*, Local Initiative Program) in the early 1970s; and such initiatives as the Human Resources Development Association (HRDA), an NPO established in Halifax in 1978, which created enterprises to train and employ welfare recipients – an extraordinary social innovation at the time. The HRDA adopted an entrepreneurial strategy and suggested converting the cheques of welfare recipients into venture capital to start up companies and hire the recipients as employees. There have also been many Aboriginal initiatives, such as the Kitsaki Development Corporation in Saskatchewan, established by the La Ronge First Nations, which launched an entrepreneurial and equity strategy, the Dana Naye Ventures in the Yukon, the Nisga'a Economic Enterprise Corporation in British Columbia, and the Duffield First Nation, which has played a key role in the war on substance abuse. The many CFDCs in rural areas across Canada and LDCs throughout Québec are intermediaries that have played and continue to play a leadership role in CED and the social economy.

International comparisons and the transfer of knowledge

The inventory of best practices must include international experiences so as to permit *international comparisons*. On the one hand, specific Canadian initiatives are “exported” or are “exportable” (*e.g.*, governance and development funds); on the other, some initiatives in the South are becoming increasingly relevant especially in the struggle to eliminate poverty (*e.g.*, collective kitchens, microfinance). International relations among associations, organizations, research centres and governments contribute to *the transfer of knowledge* with a direct impact on social economy practices in the various countries. The development of the social economy in each country needs to be followed. The means for doing so exist given the numerous independent and university research centres working on different aspects of the social economy. Moreover, international organizations such as the ILO and the OECD have research programs on the social economy.

The transfer of knowledge on an international scale has already produced important results. For example, the micro-credit and micro-financing initiatives developed in Bangladesh (loan circles), Latin America (the ROCCAs) and Africa (the *tontines*) have exerted a strong influence on solidarity-based finance practices in most countries in the North. Similarly, collective kitchens in Peru served as examples for

Québec initiatives of the same type. In the realm of socio-legal innovation, Italy's social cooperatives were a key influence on the Québec government when it passed legislation creating solidarity-based cooperatives. The new law on activity and employment cooperatives (*cooperatives d'activités et d'emploi*) passed by the French government for self-employed workers could also serve as a model. The UK has made significant headway in legislation on the capitalization of social enterprises by creating the Community Investment Company (Brady, 2003), a model that Canada could draw on for the capitalization of social economy enterprises. In addition, the experience of social enterprises in the UK should be examined more closely. These initiatives have had a major impact on the development of new public policy (Eunson, 2003; Emerson, 2001; Brady, 2003; Harding, 2004). In Europe, the social economy is the order of the day. The European Commission considers the social economy as one of the main sources of growth over the next ten years (Brady, 2003), and the European Social Fund is very receptive to social economy proposals.

Canadians have learned a great deal from their US counterparts about community economic development, especially for establishing CDCs (Community Development Corporations) and CEDCs in Québec. Community Development Corporations in the US date back to the 1960s. Land trusts and community finance developed in the US also influenced Canadian initiatives. The Association communautaire d'emprunt de Montréal (ACEM) was Canada's first community-based investment fund. Established in 1990, ACEM learned from the experiences and advice of American actors involved in community-based finance. Cooperation with US practitioners and researchers continues to play a major role in the capitalization of social economy enterprises. Of particular interest among US initiatives is the Community Development Finance Authority (CDFA) in New Hampshire, a NPO providing social enterprises with financing from the community eligible for tax credits of 75 percent. Investments are made through the CDFA, not directly into the social enterprises, thereby reducing the risks of investors. The CDFA is a social innovation in finance, a sector that continues to seek new ways to capitalize social economy enterprises.

Other international initiatives are worth following as well, including the Grameen Bank in Bangladesh, Mondragón in Spain, and the social cooperatives and Banca Etica in Italy, all of which represent important innovations in the social economy. The importance of international networks such as the International Association for Investment in the Social Economy (INAISE) and the Association for Research on Non-Profit Organisations and Voluntary Action (ARNOVA) in the sharing and circulation of information, should not be underestimated. Among the international solidarity associations in the field, we include the *Rencontres internationales de l'économie sociale et solidaire* that will hold its third international forum in Dakar in 2005 (the first two were held in Peru in 1997 and in Québec in 2001). International and continental social economy networks include the Réseau international de développement économique local et communautaire (International network for local and community economic development), bringing together local development actors from Canada, Costa Rica, Chile, Peru and El Salvador and supported by Canadian

Heritage, CIDA and the Department of Foreign Affairs and International Trade (DFAIT); the Canadian Cooperative Association; and the European Network of Cities and Regions for the Social Economy, among others. In Canada, the North American Network for the Solidarity Economy (NANSE) is establishing itself as a network of networks including CCEDNet, the Chantier de l'économie sociale and various US organizations, as we write.

In the realm of *research*, many university and independent research centres are contributing to the advancement of knowledge on the social economy. The numerous case studies produced not only document the efforts involved in these initiatives as well as the broad range of innovations but are contributing significantly to the development of an appropriate methodology and analytical tools. The centres include, among others:

- The International Centre of Research and Information on the Public and Co-operative Economy/Centre interdisciplinaire de recherche et d'information sur les entreprises collectives (CIRIEC);
- The European EMES Network;
- The Centre de recherche sur les innovations sociales (CRISES), made up of seven Québec universities;
- The Cooperatives Research Unit of the Open University at Milton Keynes, UK;
- The International Society for Third-Sector Research (ISTR) at Johns Hopkins University;
- Stanford University's Center for Social Innovation, which contributes to research on social enterprise, leadership in the (non-profit) third sector, social responsibility and related public policy.
- The Issan (Istituto Studi Sviluppo Aziende Nonprofit), Trento, Italy;
- MUEC (Master Universitario in Economia della Cooperazione, Bologna, Italy).

Independent research centres in Canada include the Caledon Institute, the Tamarack Institute, Vibrant Communities, the Canadian Centre for Social Development and the Canadian Public Policy Network, among others. In the UK, the New Economics Foundation (NEF) has been a pioneer in local development, sustainable development, social enterprise and qualitative socio-economic indicators.

It is also possible to document the impact of social economy initiatives and associations, groups, intermediaries on public policy in the South. For example, a National Social Economy Secretariat has been established in Brazil. In Argentina, the Minister of Social Development announced that the social economy is a priority for her Ministry. In Europe, the European Commission has undertaken to promote the development of the social economy. In France, more and more elected municipal officials, members of the Green Party, are promoting the social and solidarity-based economy, and there, as in other European countries, specific government programs provide for its development. In Canada, the federal government has for the

first time appointed a Parliamentary Secretary for the Social Economy within the Ministry for Social Development. It has also undertaken to invest substantially in the development of the social economy, a commitment made in the 2004 spring budget.

Research directions and questions

The social economy may be considered from a *micro* perspective, as individual organizations and enterprises, or from a *macro* perspective, as a group of relatively distinct organizations and enterprises that have relations with both the State and the private sector. Moreover, since the social economy raises both economic and political questions, we can identify many research questions that can be addressed by disciplines like the social sciences and the humanities. Depending on the approach, priority should be given to qualitative or quantitative methods as part of a primarily inductive, interdisciplinary methodology. With this in mind, and in light of our earlier comments, we provide a few proposals for the directions research in the social economy might take under three broad categories.

Research on *social economy organizations (micro perspective)* has produced many case studies, particularly on the conditions underlying success. However, if the objective is to improve the performance of organizations, research needs to focus on themes such as the following:

- Conditions underlying the emergence and dissemination of social innovations in the social economy;
- Greater knowledge of evolving sectors in social economy organizations and enterprises;
- New sectors of activity (*e.g.*, fair trade, recycling and environmental business);
- Work relations and conditions of work (including the place and role of unions);
- Relations with users, including their participation in personal services;
- The contribution of volunteers and their relationship with others involved;
- Presence and role of women;
- Social economy organizations and enterprises in Aboriginal and cultural communities;
- Training and collective and individual learning;
- Democratic practices and appropriate governance;
- Strategic planning;
- Performance evaluation criteria;
- Development of appropriate accounting practices;
- Social marketing;
- Use of new information technologies;
- Funding and mobilization of a diversity of resources (hybridization capacity);

- Use of the various collective tools and services provided by the State;
- Response to needs and opportunities ;
- Impact of organization on the sector and on the collectivity.

From a *macro perspective*, the social economy is, we suggest, involved in the co-production of public policy and, more broadly, in the reconfiguration of socio-economic regulations, but it needs an appropriate institutional context within which to develop in order to reach its full potential. Here, research directions might include, among others, the following:

- The place assigned to the social economy (alongside or in partnership with the private and public sectors) in economic and social development, by various levels of government, which could lead to an eventual comparison of regimes of governance of the public interest;
- The contribution of the social economy to public policies adopted by the various levels of government in Canada and abroad;
- Public policy innovations inspired by the social economy;
- Social economy innovations that could inspire new policy;
- The various legal and juridical questions pertaining to different aspects and sectors of the social economy;
- The various provincial social economy models in Canada and national models elsewhere (international comparisons);
- Evaluation of the contribution of the social economy to solving new social problems and to economic transformation in a context of globalization;
- Reliable indicators for identifying the contribution of the social economy to economic development and social development in Canada as a whole and in its regions.

International comparisons would be relevant and useful in all these cases for the reasons given in the preceding section.

Finally, research conducted in partnership and the concern for the transfer of knowledge can be accompanied by an analysis of *fundamental questions* on the nature and relationship between economic development and social development, the reconfiguration of the welfare state and socio-economic regulation. Here, there would be value in comparing the various concepts of the social economy that have been developed and seeing how they help to broaden our understanding of economic and social issues. These more fundamental research projects would generate a more accurate assessment of the practical consequences of the various theoretical approaches and concepts not only on the social economy *per se* but also, more broadly, on the social and economic development of contemporary societies.

Originality of the new CURA on the social economy

The new CURA on the social economy is an extension of the current one, which has been innovative in several ways: equal partnership, social relevance of the research program, transfer of knowledge, community capacity building, student training and employability, and enhancement of research and teaching methods. The new program should also take greater advantage of evaluations of the current CURA program, which highlight the need, among others, to:

- Create relatively strong research teams;
- Link strongly committed university institutions and partners;
- Identify clear goals and anticipated results over the short, medium and long term;
- Generate the transfer of knowledge that extends beyond research production as such, while recognizing the responsibility of researchers to contribute to the advancement of knowledge in keeping with the mission of the university.

Among the current CURAs and the INE Research Alliances, we can identify 13 projects on themes related to the social economy: sustainable development in specific communities and sectors of activity, community economic development, Aboriginal community capacity building, revitalization of medium-sized cities in transition, the elimination of poverty, evaluation of the voluntary sector, public policy and the labor market. The number and scope of these themes should come as no surprise, since all research on communities (and *a fortiori* with communities) directly or indirectly touches on themes relating to the social economy. That being said, only two of the projects focused explicitly on the voluntary sector, and only one on the social economy.

At the same time, the new program would differ from the existing CURA in at least four ways:

- *A single, unique theme*, the social economy understood in an inclusive sense (see sections one and two);
- *Specific objectives* concerning knowledge (*e.g.*, comparisons within Canada and with other countries) and enhancement of the performance of the social economy (*e.g.*, equipping entrepreneurs and their supporting associations more effectively).
- *Partnership and linkages* with actors, organizations, enterprises and associations in the social economy in order to enhance their socio-economic performance;
- *Organizational structure, i.e.*, the opportunity to create CURAs of varying size and of a CURA (or network) that would link the other CURAs in the existing program.

Under the theme of the social economy, sections one and two present the various ways of defining the social economy and related concepts (*e.g.*, social enterprise).

We propose retaining an inclusive definition and then leave it to the researchers and partners to establish an appropriate theoretical framework for the research program in light of the general and specific objectives.

Regarding objectives, the program should both make a major contribution to the development of the social economy, and to the economic and social development of Canada and its regions, to the advancement of knowledge in the social economy, and to the relationship between economic and social development. If these objectives were achieved, Canada could become a recognized leader in the social economy because of its practices and policies and its partnership-based research. Specifically, the CURA on the social economy would provide greater exposure for the contribution of the social economy to the development of public policy and, in turn, the influence of that policy on the development of the social economy. Another objective of the program is to raise the actors' level of knowledge about practices and enhance their ability to think creatively and to innovate. It should also make it possible to highlight the potential of the social economy, its strengths and weaknesses, and the factors that will ensure its success. With this in mind, the researchers and partners should identify the anticipated results over the short, medium and long term and specify the means of evaluating their performance both from the perspective of advancing knowledge and for the social economy organizations and enterprises themselves. In evaluating proposals, consideration must be given to the degree to which the research program is logically connected to the anticipated results and impacts.

To ensure linkages with the community and the transfer of knowledge, the CURA on the social economy would have to go further than the previous program. There is a need not only for a joint board of directors, as it were, but also for teams made up of researchers and practitioners working on research and transfer, so as to create an environment for R&D in the social sphere. Even assuming that the social economy fosters social innovation and that the actors therefore produce new knowledge, the fact remains that the knowledge is generally tacit, and tacit knowledge "travels" much more slowly and much less efficiently than codified knowledge. It would therefore be worthwhile to codify the knowledge, starting with the detection and identification of innovations and the establishment of teams of university researchers working with specifically assigned partners (in many instances, funding will have to be provided not only for professionals and research assistants but also for the partners assigned to work in the research teams). In this context, the CURA on the social economy should not compete with groups and firms that are assisting organizations and enterprises not to advance knowledge but to apply clearly defined sets of knowledge, or even formulas. Lastly, once research and analysis completed, the research team should focus on disseminating the results not only in the academic community but also in the other interested communities, using appropriate tools.

The new CURA should also set itself apart from its predecessor because of its *organizational structure*. Since social economy experiments and initiatives vary considerably across Canada and are deeply rooted in local communities, it would be worthwhile ensuring that the CURAs are linked with specific communities and re-

gions. This could warrant the creation of CURAs of different sizes and funding levels, depending on the research programs and the geographical areas or sectors covered or the number of institutions and partners working together. At the same time, since the CURAs are all working on themes related to the social economy, there would be *considerable value* in establishing and maintaining close relations and well-defined activities in order to facilitate comparisons between the different regions and a synthesis of the knowledge produced (see preceding sections). Significant funding should therefore be made available to fulfil this mandate, since it will involve travel, conferences and seminars, documents and newsletters, and translation costs. The proposal could take one of two forms. The first would be a Canada-wide CURA with a program covering a range of activities (conferences, site, monitoring, newsletters, documents), somewhat comparable to an observatory. The second would be based on the Canadian networks operating in a variety of fields and promoting synthesis of research work, updating of research on specific issues, meetings of researchers (and partners in the case of CURAs), and circulation of information. In both cases, the researchers and partners would receive funding on the basis of a competition under the new CURA on the social economy.

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