

## THE SOCIAL ECONOMY. DIVERSE APPROACHES AND PRACTICES IN EUROPE AND CANADA

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While the social economy originated in Europe (Desroche, 1983; Gueslin, 1997; Vienney, 1994), by the nineteenth century it emerged in North America as well, particularly in Canada and Quebec with its ties to the United Kingdom and France as well as other European countries, especially Germany and Belgium. Today, it is interesting to explore the renewal of the social economy in Europe and in Canada in the final third of the twentieth for a number of reasons. First, although Canada is an integral part of the North American continent, *inter alia* because of its participation in free trade agreements (including NAFTA), it shares many characteristics with Europe, including economic policies that are more interventionist, a more comprehensive welfare state than in the United States, and social movements that are more organised and more widely recognized by government. (Brunelle and Lévesque, 2004; Lévesque, 2001). Second, the renewal of the social economy, notably in Quebec, benefited from a rich dialogue *inter alia* with France, on theoretical approaches as well as from comparisons of experiences. An important example of comparative analysis was undertaken by the France-Quebec Social and Solidarity Economy Project that influenced the development of public policy to support the social and solidarity economy<sup>1</sup>. Lastly, new theoretical approaches to the social economy are increasingly the result of a fertile exchange between several scientific associations and international research networks such as CIRIEC, EMES and ISTR<sup>2</sup> (Evers and Laville, 2004; Laville and Cattani, 2005).

This paper, which is divided into three sections, provides an overview of the realities and approaches to the social economy in the European Union and in Canada. In the first section, we identify the major periods in European history in which there is a clear articulation between the economy and solidarity, including the recognition of the social economy and the emergence, in recent decades, of a new dynamic that we explore in the context of the ambiguities inherent in the position taken by the European Union. In the second section, we provide a rough outline of the social economy in Canada and in Quebec, focussing on what some have called the “new social economy”, which emerged in the 1970s but above all in the 1980s. In the third section, we discuss the various definitions and theoretical approaches that researchers have used to portray this new reality. While stakeholders have been searching for a consensus definition, researchers have proposed a multiplicity of definitions resulting from their construction of the object of research, the contours of which vary according to the underlying theoretical approach (Bourdieu, Chamboredon and Passeron, 1968). The literature and the experiences that we draw upon for our overview in this article is the result of extensive research and engagement of the three researchers in close

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1. <http://www.unites.uqam.ca/econos/index.htm>.

2. CIRIEC: International Center of Research and Information on the Public, Social and Cooperative Economy, [www.ulg.ac.be/ciriec](http://www.ulg.ac.be/ciriec); EMES: Research programme on the emergence of social enterprises in Europe, [www.emes.net](http://www.emes.net); ISTR: International Society for Third Sector Research, [www.istr.org](http://www.istr.org).

collaboration with the research teams<sup>3</sup> to which they belong – ARUC-ÉS and CRISES in Canada and CRIDA and LISE in France.

## **ECONOMY AND SOLIDARITY: A EUROPEAN HISTORY**

Modern associations could emerge once democracy had taken hold in Europe. Associationism was initially seen as linked to citizenship and fundamentally socio-political (Evers, 1997: p. 51).

In the United Kingdom of the nineteenth century, the concept of charitable organizations was linked to the debate on citizenship; charity was a social principle, an essential component of a democratic society that helped to regulate it through the establishment of moral objectives and altruistic voluntary commitment. The objective of government in Victorian England was “to provide a framework of rules and directives to enable society to manage itself to large measure”. As a result, associations and their charitable activities were not funded by the government, but run with a high degree of autonomy; at the same time they forged cooperative links with the authorities responsible for legislation on poverty. In addition, a large portion of the social security benefits was financed and managed locally, with limited central government assistance, giving rise to a host of “institutions that acted as intermediaries” between the State and citizens while being at the same time “an integral part of the State” (Lewis, 1997: p. 169).

In France, however, while part of the community of associations arose from a philanthropic desire for social harmony, the reality was also shaped by republican egalitarianism. In the mid-nineteenth century there emerged a conception of solidarity as a social democratic link. Thus did Leroux describe the notion of solidarity by stating that “Nature did not create a single being for itself... It created all beings for each other and gave them a relationship of reciprocal solidarity” (Leroux, 1851: p. 170). To escape competitive individualism and authoritarian statism alike, Leroux looked to networks of solidarity involving workshops, as well as to associations and the press in order to sustain the public spirit essential to democracy. Along these lines, projects seeking to set up a “fraternal” or “solidarity-based” economy flourished in the 1830s and 40s during a real surge in associationism.

These two cases evoke the two main sources of European civic associationism, and they both make reference to the broad and polysemic notion of solidarity (Laville, 2005a). Joint actions initiated in the name of solidarity were inextricably social, economic and political. Their effects were disseminated throughout the nineteenth century. In particular, they provided the basis for forms of public action that underlay the construction of a social State. At the same time, legal structures were put in place. Still this institutionalisation led to a widening gap between dimensions that had previously been linked. Ties with trade unions loosened because of ideological tensions within the labour movement.

### ***The social economy***

In the late nineteenth century and throughout the twentieth century, divisions and fragmentation in all social economy organisations were exacerbated by legal compartmentalization and integration into the dominant economic system. Three sub-groups stand out clearly: co-operatives, mutual societies and associations.

- Co-operatives were integrated into the market economy, occupying sectors in which capitalist activity remained weak. They enabled a variety of groups to mobilise resources necessary for

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3. The corresponding websites are: [www.crises.uqam.ca](http://www.crises.uqam.ca); [www.aruc-es.uqam.ca](http://www.aruc-es.uqam.ca); [www.crida-fr.org](http://www.crida-fr.org); and <http://lise.iresco.fr>.

their activities but avoided by investors. While some types of co-operatives, such as agricultural co-operatives, emerged almost everywhere, others were more country specific, such as consumer co-operatives in England and housing co-operatives in Germany, Great Britain and Sweden. In countries where the pace of industrialisation was less rapid, such as France and Italy, workers' production co-operatives developed, promoted in Italy by the industrial districts of the Third Italy. While co-operatives were able to benefit from certain arrangements negotiated with the State, for the most part they were subject to competition. In general, the logical consequence was to concentrate the means of production, which prompted them to specialise in major activities linked to the identities of their members. Concern for the long-term survival of the enterprises caused broader political objectives to be scaled back, and the transformation continued – so much so that associations gradually became “genuine financial groups, resembling the co-operative institutions typical of developed capitalist economies” (Vienney, 1982, p. 108).

- The creation of the welfare state profoundly altered the role played by mutual societies in Europe. Numerous initiatives had been taken in the early nineteenth century to respond to problems of work disability, illness and old age with solidarity, bringing together members of a profession, an industry or a geographical area. Seen as instruments of worker emancipation by socialists, as barriers against social unrest by liberals and conservatives, these mutual societies were tolerated and controlled by government, as in Belgium and France, from the middle of the century. And the levels and conditions of contributions and benefits were made uniform nation-wide. The risk inherent in these benefits could in fact be managed better thanks to the participation of a large number of members throughout the country and the support provided by statistical techniques. The security of the system was assured by instituting compulsory insurance schemes (illness, old age). The nature of the economic activities involved created a dependency on social security systems after the Second World War, and mutual societies became social protection organizations complementary to compulsory schemes. They became subject to State-prescribed standards to supplement social transfers, even if it meant altering the principle of voluntary membership to be able to provide contingent and complementary support. In Denmark, Spain, France and Italy, mutual societies pooled their health insurance activities with those of administering health care and social welfare institutions. However, heightened competition in insurance markets put them to a severe test, similar to that of mutual insurance companies covering property-related risks.
- Associations have been closely linked to different welfare states, corresponding with the three models of welfare state regimes identified by Esping-Andersen (1990). In the first model, that corresponds with the universalist or social democratic systems of Scandinavian countries such as Sweden and Denmark, broad reliance on the State as the organiser of society considers social services as a “collectivisation of needs” (Leira, 1992), giving priority to social integration and gender equality. In this framework, the role of associations has been to exert social pressure by giving voice to demands, and they have mobilised networks to press for the delivery of benefits by the public service. In the second configuration, corresponding to liberal and dual systems, services are largely absent. Under the liberal welfare state system characteristic of the United Kingdom, government intervention is concentrated on the most disadvantaged sectors of the population. Neutrality in the area of service delivery has been maintained. The corollary of this is a lack of child care, which causes a great many women to have to work only part-time (Lewis, 1992). A scarcity of government-regulated non-market services is also characteristic of the dual systems specific to southern Europe and exemplified by Spain, Italy and Portugal. Focussed on cash transfers, such systems eschew services and give protection to people well integrated into the labour market, at the expense of persons trapped in insecure jobs or in the underground or informal economy; here, “access to rights is neither universal nor egalitarian, but operates on the basis of personal knowledge, privilege and patronage” (Ferrara, 1996). In both these

configurations, the role of associations as producers of goods or services is very limited, but for opposite reasons: in the universalist model, the creation of many new services, with tasks previously performed by the private sector being shifted to government; and in the liberal and dual models, weak externalisation of services, with tasks remaining largely performed by women and maintained in the private sector. For its part, the third configuration corresponds to a corporatist system. In contrast to the other two, this configuration gives associations a major role as service providers. Hierarchical regulation governs relations between associations and government, associative services being considered an integral part of social policies financed by taxes or social security contributions. The State establishes the rules for how services are delivered and for the wage-earning occupations that provide them. If the rules are complied with, funding is provided through redistribution. In Germany, Austria, France and Belgium, associations were pioneers in social services, identifying emerging social requirements which were subsequently kept in the associative sector, albeit under control of the State. State regulation has brought associations closer to the government and prompted them to form major nation-wide federations (affiliated with political parties, churches, the Red Cross and non-aligned organisations in Germany; lay and Catholic in France; socialist and Christian in Belgium).

In all, the full range of social economy organisations, favouring the accumulation of community assets over the remuneration of capital, took root throughout Europe. Over 30% of the population are members of one of these associations: co-operative banks, with their 36 million members and 91 million customers, hold 17% of the banking market, and co-operative and mutual insurers account for almost 30% of the insurance market. Lastly, such organisations provide 8.5 million full-time equivalent jobs, or 7.7% of salaried civilian employment (CIRIEC, 1999).

While the economic importance of the social economy was consolidated over the course of the twentieth century, the same cannot be said for its political influence. The selection of members on the basis of their contribution to the activity considerably diminished the sense of belonging in which the pioneering associationist dynamics had been rooted. Specialisation, assessment of the productive efficiency of co-operatives and mutual societies against that of other enterprises, and the integration of associations into national social policies caused the focus of social economy organisations to become more technical. Despite occasionally taking strong positions – on the future of health care systems, for example – these various entities had only a slight impact on public debate and in many cases abandoned their societal ambition in favour of management performance or compliance with public standards.

The loss of multi-dimensionality was reflected above all in an abandonment of political aspects, but also in a separation between the various entities. While co-operatives and mutual societies stem from the same roots as associations, this common origin has been forgotten in countries like the United Kingdom. This explains the reference, not to the social economy, but to the “third sector”, formed exclusively by non-profit organisations (NPOs), to the exclusion of mutual societies and co-operatives alike, in line with the dominant approach in Anglo-Saxon countries. Thus the reference to the social economy is not a consensual one in Europe, and it emanates primarily from the French-speaking countries. It is mainly in those countries that the various organisations identifying with the social economy began in the 1980s to attempt a *rapprochement* to reaffirm their identity. But as this regrouping was taking shape “at the top”, a groundswell of grass-roots associative and co-operative sentiment was renewing its commitment to a solidarity-based economy.

### *A new dynamic*

Innovations emanating from civil society networks emerged throughout Europe, for the most part as associations and co-operatives that adapted differently to changes in social action according to the form and nature of the welfare state in their respective countries.

In Scandinavian countries, new organisations responded in ways that were different from those of traditional associations. They abandoned the hegemonic political and cultural approach of the 1970s, and instead proposed “new organisational forms and solutions to local social problems” in the 1980s (Klausen, Selle, 1996: pp. 99-122). Among these were Denmark’s “project developers”, that included one or more highly engaged individuals and Swedish day care co-operatives. In Sweden, in 1994, a total of 1 768 non-municipal child care centres were in operation, accommodating 12% of all children in day care facilities. Of these, 1 020 were parents’ co-operatives and 117 were workers’ co-operatives (Pestoff, 1997, 1998). In this context, co-operatives and associations contributed to both a redeployment of existing services and the creation of new ones. The “co-operatisation” of social services (Lorendahl, 1997; Pestoff, 1998) sought above all to expand the roles of users, such as parents, in arranging for the care of their children, and it was accepted despite the financial constraints on the public sector.

At the other end of the spectrum, in Mediterranean countries with dual regimes, it was nonetheless the same juridical form was used: there, co-operative status was used to propose services that the public sector was unable to deliver. In Italy, social co-operatives emerged in the 1970’s in many regions because of their ability to perform functions previously unfulfilled, such as providing jobs for those excluded from the labour market and creating a range of services for individuals. These developed rapidly. By 2004, 7 100 co-operatives involving 267 000 individuals, including approximately 223 000 wage-earners and 31 000 volunteers were providing services for hundreds of thousands of people (Borzaga, Zandonai, 2004). Thus, even if the social economy in Italy remains less substantial than in other countries because of the dominant role of the State in sectors such as education and health care (Gui, 1992), the recent dynamic activity of co-operatives based on “social solidarity” is significant. It proves that confidence in cooperatives based on the non-redistribution constraint (Hansmann, 1980; Ortmann and Schlesinger, 1997: pp.97-119) can be replaced by other characteristics specific to co-operatives, such as the participation of stakeholders or the behaviour of entrepreneurs and workers (Young, 1983; Borzaga and Mittone, 1997).

In Portugal, the law on social solidarity co-operatives passed in 1998, brings together “salaried” members, the recipients of services, and “voluntary” members, the non-salaried providers of goods and services. Social co-operatives emerged in Spain at the same time. The general law of 1999 makes reference to social-service co-operatives providing education, health care, and insertion into the labour market as well as fulfilling other social needs not covered by the market. At the regional level, there are mixed co-operatives for social integration in Catalonia, and co-operatives for social integration in the Basque country and the Valencia region, where certain workers’ co-operatives comprising mainly home-care employees developed into mixed organisations of producers and consumers (Sajardo-Moreno, 1996). To a lesser extent, in the United Kingdom the voluntary sector has been replaced in some areas by social co-operatives providing such services as job placement, child care and home care. The number of initiatives, which is difficult to ascertain, may be no more than a few dozen, but there are also many community enterprises, particularly in Scotland, which in 1995 accounted for 400 enterprises and 3 500 employees throughout the United Kingdom. At the same time, voluntary organisations helped to fill some of the gaps, as illustrated by the formation of playgroups for pre-school children. By 1986, more than half of the children in England and Wales enrolled in some sort of facility were attending playgroups – a part-time service for children under five years of age that was the result of measures taken by parents to respond to the shortage of child-care programmes.

The expansion of co-operatives for the above activities was due to legislation permitting co-operatives, that had traditionally been homogeneous entities, to now involve a variety of stakeholders in the decision-making process (volunteers, workers, consumers, local communities, etc.). The 1991 legislation in Italy provided for precisely that kind of expansion. Furthermore, it is not surprising that social co-operatives developed in countries where welfare state systems had sought very little assistance from service-delivery associations and where associations were restricted in their economic activities. The

situation is very different in countries with corporatist regimes, where government authorities have established close partnerships with associations.

In Germany and Austria, the initiatives were termed “self-help” in an effort to reflect a desire to empower the people involved. The initiatives can be divided into three sub-sectors: semi-informal groups, self-help groups (*i.e.* groups of individuals affected by the same problems) and groups defending the cause of certain populations outside the group. They are formed on a voluntary basis, and paid work is only complementary. There have been roughly 70 000 such initiatives in Germany, involving some 2.65 million persons, half of whom could be considered part of the third system (Evers, Bode et al., 1999). These began to flourish in the 1980s, especially in health care and social action, with between five and ten thousand groups in health care alone. They are rooted in a critique of the bureaucratisation of services in the public sector and in large charitable organizations which also include older associations with which they cohabit. In Vienna, for example, 65 000 children were being cared for, half of them in the public sector and the other half in associations, that are at the same time traditional as well as the product of grassroots initiatives (Leichsenring, 1997).

In France and Belgium, the focus of efforts has been to devise new ways of providing associative services, acknowledging that the lack of a profit motive alone does not ensure user respect. As major, long-standing service providers, associations had virtual local monopolies. Because of a tradition of co-operation between government and associations, new groups adopted the same legal status, but on a renewed commitment to associational relations. According to their promoters, the ultimate legitimacy of service delivery by associations hinges on their ability to give users a “voice”, as Hirschman put it (Pestoff, 1998), to mobilize voluntary commitment from a variety of sources, and to find a new financial equilibrium in a context offering less protection.

### ***Recognition by government***

This new dynamic stems first from the tertiarisation of the economy. In a configuration in which services account for over 70% of aggregate employment, relational services are becoming ever more important. Moreover, in the countries belonging to the Organisation for Economic Co-operation and Development (OECD), trade, services to business, the hotel and restaurant industry, personal and household services, education, health care, social action and public administration account for most jobs, and their share is increasing steadily. The central role of these services in which activity is based on direct interaction between service provider and recipient more than explains the volume of job creation in service associations and co-operatives. Indeed, the amount of tangible assets is less important than the quality of communication between the parties or investment in intangibles (Laville, 2005b).

Along with these economic changes have come shifts in how public commitments are undertaken. Militant activism, associated with a project for social change and entailing long-term action and extensive delegation of powers within federative structures, has waned, as illustrated by the weakening of trade union and ideological affiliations. On the other hand, the crisis in voluntarism among the most highly institutionalised associations has been accompanied by an associative effervescence in specific commitments for limited periods, focusing on particular problems and striving to deliver rapid responses (Barthélémy, 1994: p. 48). The question raised is the interrelation between voluntary work and political and social participation. From the 1960s, there emerged new initiatives on the fringes of traditional social movements, combining social co-operation, mutual assistance and protest. The role of associations from this perspective, is not simply to deliver services and jobs; it encompasses a search for forms of involvement other than occupational or political participation, and is related to the issue of social cohesion and citizen participation.

In this new context, both economically and politically, this dynamic calls for a revision of the status of associations and co-operatives, as well as the invention of new types of organisations reaching out to multiple stakeholders (Lipietz, 2000). This is what was initiated by the legal provisions governing social co-operatives in Italy in 1991, extended by the 2005 Act on social enterprises; “limited liability social co-operatives” in Portugal in 1999; the role in social services accorded to co-operatives in Spain’s 1999 legislation on co-operatives, followed that same year by adoption of precise legal frameworks by Spanish regions; the introduction of social-purpose companies in Belgium in 1995; community interest co-operatives in France in 2003; and new legislation on community interest companies in the United Kingdom. In addition, in 2002 the British government launched the Coalition for Social Enterprise and created a Social Enterprise Unit, centred on enterprises having social goals and imposing limits on dividend distribution to shareholders (Defourny, 2004).

It remains that at the European level, the articulation between recent manifestations of civil society and the older social economy have not been fully realized. From the perspective of the European Commission, the potential for job creation has been a more pressing concern. This recognition of the social viewpoint stemmed from a long process triggered by the White Paper on “Growth, Competitiveness and Employment: The Challenges and Ways Forward into the 21<sup>st</sup> Century” presented by Jacques Delors in 1993, pursuant to the mandate assigned by the European heads of State (Jouen, 2000: p. 19). Here the emphasis was on responding to new needs, providing a wellspring of new jobs. From that initial assumption, the work carried out by the European Community’s Forward Studies Unit provided elements of macroeconomic evaluation of the employment potential. Above all, however, the research conducted in the various European Union countries identified the socio-economic dynamics whereby this “wellspring of new jobs” had already begun to take shape. Converging observations pointed to the usefulness of an innovative approach – that of local development and employment initiatives (Jouen, 2000) – and identified 19 supply areas (European Commission, 1995, 1996, 1998) in four broad sectors of activity: services for daily life; services to improve living conditions; cultural and leisure time services; and environmental services. Extending these investigations, the European Commission conducted a programme to enhance the value of local initiatives intended to stimulate exploration and action in this area, in particular by reconfiguring structural funds, and via a pilot programme of the Directorate-General for Employment on the “third system” to get a better assessment of the system’s impact on job creation. But there was no real link between this exploration of job creation and the French-speaking countries’ earlier efforts in favour of the social economy (Delors, 2004). In this regard, it should be recalled that in the 1980s the European Commission created a Directorate-General devoted to the social economy. However, because of its limited legitimacy and funding, it remained marginal until it was eventually abolished in the 1990s. Its activities were formally integrated into the Directorate overseeing small and medium-sized enterprises, but the shift in institutional responsibility reflects its reduced visibility with regard to economic issues. Nevertheless, the associative rebound triggered an opening-up of the “Information Society” Directorate-General to associations, which by then were considered a means of enhancing citizen participation in European construction. Permanent structures like the European Consultative Forum on the Environment and events such as the first Convention on Civil Society, held in 1999 by the Economic and Social Committee, sought to initiate a “civil dialogue”. It was then that political aspects took precedence, and one spoke not of the economy but of associations, civil society or non-governmental organisations.

## **THE VARIETY OF SOCIO-ECONOMIC EXPERIMENTATION IN CANADA**

The convergences between Europe and Canada are striking, especially with regard to the new social economy, but there are divergences in their historical trajectories, especially with respect to Quebec. First, despite origins that are in some ways comparable (Petitclerc, 2004), mutual societies did not play as central a role in Canada as they did in Europe with regard to social security, and the recent trend towards demutualisation has reduced their numbers. Nevertheless, the ones that did retain their legal form – and especially those affiliated with trade unions (*e.g.* SSQ Groupe Financier in Quebec) – generally did so

advisedly. Second, co-operatives played a strategic role in economic development, especially in agriculture (*e.g.* the Wheat Pool in western Canada and farm co-ops in Quebec) and in savings and loans (*e.g.* the Desjardins movement in Quebec and credit unions throughout Canada). Third, Quebec co-operatives played an important political and cultural role relating to the issue of French-speaking control over the Quebec economy, which imbued them with a sort of “soul” (Lévesque, 1993, 1990, 1989). In this context, it will be understood that even if tensions (Favreau, 2005) exist between groups such as the Conseil de la Coopération du Québec<sup>4</sup>, which unites all of the co-operatives, including the solidarity co-operatives created in 1996, and the Chantier de l’économie sociale<sup>5</sup>, a network of networks of most actors in the new social economy, relations between the two must be seen in different terms than in Europe (Lévesque, Malo and Girard, 1999). For example, the Mouvement Desjardins facilitated the constitution of the Chantier de l’économie sociale and even housed the organisation in its Complexe Desjardins facility during the initial years of its existence, donating a former bank office for the headquarters. Similarly, the Conseil de la Coopération du Québec and the Chantier de l’économie sociale are both represented in the Canadian section of the International Centre of Research and Information on the Public, Social and Cooperative Economy (CIRIEC) and in the Réseau d’investissement social du Québec (RISQ), an investment fund dedicated to the social economy. Yet what makes the relationships more complex, but rich with new co-operation potential, is the diversity of connections and in some cases orientations that are increasingly to be found among organisations sharing the same juridical status<sup>6</sup>.

While the concept of social economy is used to greater and lesser degrees from one Canadian region to another, the reality to which it refers is more widespread (Vaillancourt, Aubry, Kearney, Thériault and Tremblay, 2004; Bagaoui, 2002; Chouinard and Fairbain, 2002; Fairbain, 2002; Brown, 2002, 1997; Vaillancourt and Tremblay, 2002, 2001; Jetté, Vaillancourt and Lévesque, 2001; Fontan and Shragge, 2000; Banting, 2000; Lévesque and Mendell, 2000; Leduc-Browne, 1999; Leduc-Browne and Landry, 1990; Lawson and Thériault, 1999; Mac Leod, 1995; Watson, 1994; Douglas, 1994; Quarter, 1992; Lévesque and Malo, 1992). In this regard, Quebec’s experience recently inspired the Canadian government, which acknowledged the social economy by creating a secretariat for the social economy and adopted a social economy development policy (Government of Canada, 2004, 2004a). The government also announced the earmarking of new funding for social economy initiatives: \$100 million, \$30 million of which has been designated for Quebec for permanent capital investment in social economy enterprises through the creation of a secondary market; this is supplemented by \$17 million for capacity building, including \$3 million for Quebec, and \$15 million for research. This was possible because, as in Europe, there has been a multitude of civil society initiatives in economic development and social development, in a great many cases with State support (Brady, 2003; Evers and Laville, 2003; Comeau, Favreau, Lévesque and Mendell, 2001; Lévesque and Ninacs, 2000; Favreau and Lévesque, 1996; Laville, 1994, 1992; Defourny and Monzon, 1992; Monzon and Barea, 1991). These socio-economic initiatives, which distinguish themselves from those associated with either the public or the private sectors (hence the use of the term “third sector”) are increasingly recognized for their capacity to achieve success in areas where the other have failed, either separately or even in combination (Economic Council of Canada, 1990; OECD, 1999).

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4. The Conseil de la Coopération du Québec was founded in the early 1940s. See its web site: <http://www.coopquebec.coop/>.

5. The Chantier de l’économie sociale was founded in 1996 in conjunction with a Quebec socio-economic summit, but it became autonomous as a non-profit organisation in 1999. See its web site: <http://www.chantier.qc.ca/>.

6. For example, non-profit associations are not all represented in the Chantier de l’économie sociale whereas certain co-operatives, such as solidarity co-operatives or home care co-operatives, share a number of features with associations working in the same areas.

The social economy includes both new personal services to fulfil needs that the welfare state meets poorly if at all (as a rule, predominantly non-market services) and new economic activities (often predominantly market-based) to help integrate excluded persons into the labour force or to revitalise rural areas or declining or even abandoned urban ones (Fontan, Klein and Lévesque, 2003). Because of this capacity to mobilize a broad range of resources, some analysts refer to the social economy as reflecting a wide diversity of worlds and logics (market, civic, industrial, domestic, inspiration and project based approaches) (Enjolras, 1995, 1995a). While the aspirations of the 1970s for sustainable development and quality of life continued to prevail over the last two decades, the renewal of the social economy (as a reality and not as a concept) in Canada was deeply affected by the crisis in the early 1980s and the impact of globalisation and the opening-up of markets, economic restructuring and the rise of the knowledge-based economy, political and social changes, the reconfiguration of the welfare state and new social issues such as social exclusion and new forms of poverty. The crisis and profound changes led to new opportunities and new needs that would mobilize civil society actors and lead to a new-generation social economy<sup>7</sup>. Social innovations emerged both to respond to new and 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 initiatives generally reflect the search for new relationships with the State and the market and the need for new regulations and a new division of labour, as is the case in Europe (Evers and Laville, 2004; Pestoff, 2004; Favreau and Lévesque, 1996; Comeau, Favreau, Lévesque and Mendell, 2001).

**Table 1. Four major categories of social economy organisations and enterprises**

Needs and opportunities Relationship to the market	Social economy (responding to urgent social needs)	Social economy (responding to new opportunities)
Predominantly non-market based social economy (social development)	Examples: Shelters for the homeless Collective kitchens Reintegration of school dropouts	Examples: Child-care Perinatal centres Eco-museums
Predominantly market based social economy (economic development)	Examples: Training businesses Readaptation centres Soup kitchens Community-based investment funds Development funds	Examples: Social enterprises Labour co-operatives Natural food co-operatives Organic farming Recycling

Source: Lévesque, 2003

As Table 1 clearly shows, the new social economy has developed primarily in two areas: as a strategy to combat poverty and social occupational exclusion, in which initiatives respond to urgent social needs and critical social situations and the creation of new wealth, with initiatives responding not only to needs but also to 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 organisations. Each area (responses to

7. According to Statistics Canada (2004), in 2003 there were 161 227 non-profit and voluntary organisations in Canada, 46 326 (28.7%) of which in Quebec. Their main areas of activity were sports and recreation (21%), religion (19%), social services (12%), grant-making, fund-raising and voluntarism promotion (10%), arts and culture (9%), and development and housing (8%) (Statistics Canada, 2004: p. 10). While not all of these organisations are part of the social economy, their numbers and areas of activities reveal the vitality of civil society.

urgent social needs or to new opportunities) include initiatives that involve predominantly non-market activities and, as a rule, are oriented towards social and cultural development, as well as predominantly market activities, more closely associated with economic development. In other words, responses to urgent social needs and to opportunities can both involve social development or economic development, but predominantly non-market initiatives tend to take the form of non-profit associations, whereas those that are predominantly market-oriented can be non-profit organisations, co-operatives or mutual societies. In addition, there are a large number of support and advisory organizations and sectoral and regional networks. In Quebec, the Chantier de l'économie sociale has been providing a governance framework for all sectors in the social economy since 1996<sup>8</sup>.

Predominantly market-oriented social economy organisations and enterprises (such as natural food co-operatives and recycling enterprises) must factor in market forces to be viable, but the presence of market activities alone does not mean that profit-making has become an objective (Desmoustier, 2000). In addition, predominantly non-market organisations and enterprises, which receive a substantial share of their resources from the State through redistribution, also benefit from voluntary work and grants through reciprocity, and include a variable proportion of market activity (Zimmerman and Dart, 1998). Seen from this perspective, the boundaries between economic development and social development are often blurred in the social economy, as illustrated by community economic development (CED), whose activities involve job creation and the promotion of new business creation as well as the development of proximity services (e.g. social housing) and training to enhance the employability of excluded persons (Favreau and Lévesque, 1996). The estimated turnover of social economy enterprises in 2003 was \$19.3 billion (\$18.0 billion for co-operatives and mutual societies and \$1.3 billion for NPOs); excluding financial service co-operatives (\$7.7 billion) and mutual insurers (\$2.3 billion), the estimated turnover was \$9.3 billion (\$8.0 billion for co-operatives and \$1.3 billion for NPOs). Together, the co-operatives and mutuals in 2003 employed 77 708 persons and had 7 318 359 members. Their assets totalled \$103.9 billion. The number of co-operatives and mutual societies was 2 774 (Lepage, 2005)<sup>9</sup>.

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). All agree that while legal status facilitates the clustering of organizations faced with similar challenges, they do not necessarily ensure uniform practices. Social economy organisations that produce goods and services (economic activities in the substantive sense) must be working explicitly in the public interest (when bringing together members, similar to how self-help organizations function), which is not always necessarily the case. Furthermore, they are supposed to operate independently from the State and the private sector (hence the term “third sector”, understood as different from both the State and the private sector). This means that the social economy organization must be controlled by a voluntary association of people (hence the term “voluntary organization”) and not by State or private funders (Dreessen, 2001: p. 11). In social economy organizations, democratic procedures 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 the social actors that is more present in Quebec than elsewhere. The concept of the social economy adopted in Quebec can be summarized as follows:

- The ultimate goal of services to members or to the collectivity;

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8. See <http://www.chantier.qc.ca>.

9. The \$1.3 billion figure is an estimate provided by the Chantier de l'économie sociale. The other data are taken from Lepage (2005).

- Autonomous management (which excludes associations or organisations controlled by the State or by an external entity);
- A democratic decision-making process (which excludes non-profit organizations in which decisions are not the result of a democratic process);
- Primacy of people and work over capital in the distribution of power and proceeds;
- Individual and collective participation, control and responsibility.

In its evaluation guide, the *Guide d'analyse des entreprises d'économie sociale* (2003: A 3) characterizes the goods and services produced by the social economy emphasizing the social dimension of economic activity *i.e.*:

- The social utility of services and goods, especially for the collectivity concerned;
- The complementarity of goods and services produced to those of the public and private sectors;
- The link between economic activities and the development of local collectivities;
- The economic and social impacts on the community and on the territory.

These social dimensions of economic activity are supplemented by the manner of producing (or the conditions of production):

- Organisational democracy;
- Collective and social ownership;
- Participatory management;
- Primacy of people over capital;
- Creation of sustainable jobs;
- Worker training and employability enhancement;
- Development of the exercise of citizenship, forms of solidarity and individual and collective empowerment;
- Sustainable development.

These various ways of characterising the realities underlying the term “social economy” mirror those found elsewhere in the world, especially when the social economy is explicitly at issue (Dreessen, 2001: pp. 11-12; Making Waves, 2004; Conseil wallon de l'économie sociale, 1990; Monzon and Barea, 1991).

Because the definition of “social economy” by social actors is the result of compromise – including compromise with the State – it is 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 to encompass their own activities, whereas others seek to narrow its scope in order to highlight their differences (Kearney, Aubry, Tremblay and Vaillancourt, 2004). If we take Quebec as an example,

(for illustrative purposes), the women's movement proposed a broad definition of the social economy in order to include community action, *i.e.* initiatives for poverty reduction and combating exclusion and unemployment, as well as initiatives to increase social awareness and build solidarity – a definition that is thus not limited to the production of goods and services nor to the market portion of the social economy (David, 1997; Ninacs, 2000: p. 144). At roughly the same time, the community movement demanded that autonomous community action be clearly distinguished from the social economy in order to keep the funding that the State earmarked for popular education and the defence of social rights (Quebec, 2001). More fundamentally, these actors feared that by becoming involved in activities that were heavily entrepreneurial, they might be forced to contribute to the marketisation of daily life (which they opposed). This position surprised many, especially insofar as autonomous community action had contributed to the founding of many associations and enterprises belonging to the social economy (*e.g.* child care and adult education) (D'amours, 2002). Likewise, many actors across Canada expressed fears concerning the possible commercialisation of charitable organisations (Zimmerman and Dart, 1998) and dependence of voluntary initiatives on the State (Hall, Greenberg and McKeown, 2001). In this sense, the social economy poses a political question to social actors concerning, *inter alia*, the relationship of civil society initiatives to the State and to the market (Lévesque, 2003a).

Moreover, the recognition of the social economy by the province of Quebec and its economy-related ministries helped tilt the scales towards a more entrepreneurial and market-based vision of the social economy (Quebec, 1997). If, according to the Chantier de l'économie sociale, the government of Quebec was prepared to commit \$1.1 billion for child care centres ("Centres de la petite enfance"), \$1.7 billion for recycling enterprises, \$233 million for community housing, \$48 million for homecare and \$1.5 million for perinatal care from the year 2005, the underlying assumption was that this funding would generate positive results. Likewise, organizations for the financing and support of the social economy (such as local development centres and community futures development corporations) tend to turn more spontaneously to the market activities of the social economy than to those primarily non-market activities. While some of the more recent documents of the Chantier de l'économie sociale have been influenced by that vision (Chantier, 2002; Guide, 2003), the fact remains that the initial definition seeks to be inclusive and thus relatively broad (Chantier, 1995). In a sense, these questions over the definition of the social economy (and even over the relevance of the concept) are inevitable, given the great diversity of the actors concerned, but for researchers they also raise important research questions (and thus of object construction).

The social economy approach invites us to make a fairly explicit distinction between organizations that produce goods and services and organizations that militate for social rights: the former are to be found principally within the realm of the economy, understood concretely as the production of goods and services, while the latter operate chiefly in the political realm, seeking to influence the powers that be through raising awareness, advocacy and even lobbying (Schmitter, 1992). But insofar as the economic realm and the political realm are not impermeable, especially for economic organizations dependent on the mobilization of people, there are many hybrid cases. For example, social economy organisations, because of their democratic *modus operandi*, try to create readily accessible public spaces to define collective interests and the common good, which constitutes a political activity affecting the life of the community (Dacheux and Laville, 2004). Likewise, there are advocacy groups that fall squarely into the realm of politics that at the same time offer services to their members (which constitutes an economic activity). One example of this is the Association coopérative d'économie familiale (ACEF), which militates for the rights of the disadvantaged, but a substantial portion of whose activities consist in helping families with modest incomes to balance their budgets, or to file for bankruptcy with the fewest possible negative repercussions for the family. In the field, the definition of the social economy, and above all the recognition of that definition by the State, is fairly rapidly becoming a political issue. As a result, researchers must analyse these definitions if they want fully to grasp the challenges of the social economy – challenges that vary from country to country and from one region of a country to another (Amin, 2001).

## DIVERSITY OF THEORETICAL APPROACHES

As Erwin Dreessen (2001: p. 11) noted in his research on the voluntary sector, there are as many definitions of the social economy as there are objects of research and theoretical approaches to address the social economy<sup>10</sup>. Moreover, researchers have founded scholarly journals and formed scholarly associations and networks corresponding to these various definitions and approaches<sup>11</sup>. With this in mind, we will explore approaches that explicitly use the terms “social economy” and “solidarity economy”, although in Canada and Quebec the term “new social economy” is used as a synonym of “solidarity economy”. We will end with a review of similar concepts also used by researchers, particularly in Canada.

It is possible to go back to the nineteenth century to identify the first *Traité d'économie sociale* (Dunoyer, 1830; Desroche, 1983) and to discover a large number of authors that were using the term “social economy”: Frédéric Le Play<sup>12</sup> (1872), Charles Gide (1890), Léon Walras (1896), Max Weber, who began using the term *Sozialökonomische Wissenschaft* in 1904, and Émile Durkheim, who came upon the term “social economy” following his stay in Germany, when he discovered the historical German school (Swedberg, 1987). Such an exploration of the historical references to the social economy, reveals that the term “social economy” was used both to distinguish a new disciplinary approach to the economy (an alternative to political economy and to prevailing theories in economics) as well to unite various economic organizations based on the association of persons (Lévesque and Mendell, 1999; Lévesque, Bourque and Forgues, 2001). That said, we will limit discussion to approaches developed over the past three decades.

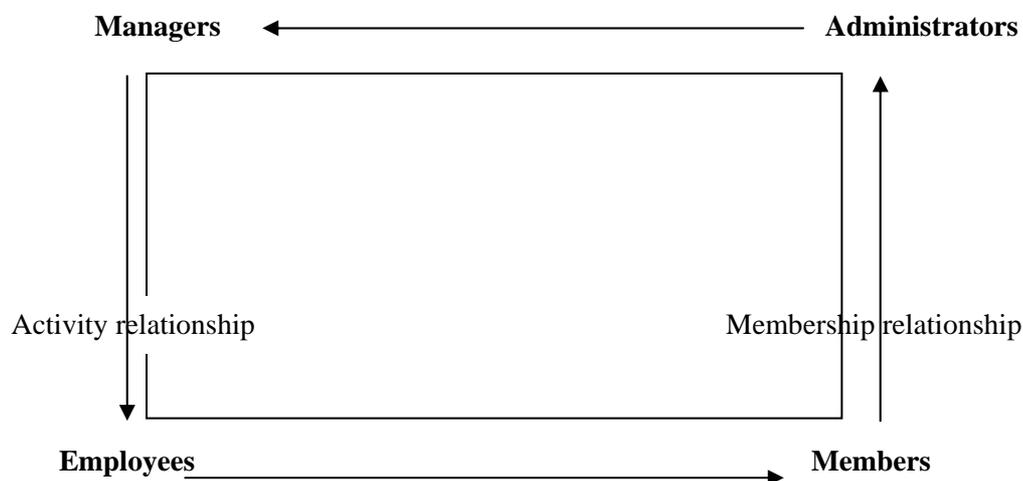
### *Approaches centred on organisations*

The resurgence of the term “social economy” in Europe<sup>13</sup> towards the mid-1970s owes much to the efforts of Henri Desroche and Claude Vienney to “theorise” the common characteristics of co-operatives, mutual societies and associations, while drawing on a tradition that was over one hundred years old. This research was carried out in close co-operation with the circles involved, especially with the Collège coopératif. Desroche and Vienney found social economy organizations to be more complex than other forms of organizations and enterprises insofar as they combine an association of persons with a goods or service producing entity, reciprocally linked in a dual relationship of activity and membership (Vienney,

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10. “No single definition of what constitutes the voluntary sector can be satisfactory because the appropriate definition depends on the purpose of the analysis or on one’s objective in the development of data” (Dreessen, 2001: p. 11).
  11. Including: ARNOVA, CIRIEC International (social economy enterprises and public enterprises), the International Society for Third Sector Research (ISTR) (Johns Hopkins University), and the Rencontres internationales d'économie sociale, EMES. They have also founded journals such as, for example, *Annales de l'économie publique, sociale et coopérative /Annals of Public and Cooperative Economics* (Oxford, Blackwell and CIRIEC International), *Économie et solidarités* (Presses de l'Université du Québec et CIRIEC-Canada), *Economic and Industrial Democracy* (Sage Publications), *Social Innovation* (San Francisco, Stanford University), *Review of Social Economy* (Routledge, New York), *Revue internationale d'économie sociale* (Paris) and *Voluntas International Journal of Voluntary and Non-Profit Organization*, New York, Kluwer Academic/Plenum Publishers.
  12. At the 1867 World’s Fair in Paris, Le Play had organised an exhibition on the social economy covering a variety of so-called “social economy” experiments and initiatives (Desroche, 1983: p. 71). Around 1850, he had founded the *Société Internationale des Études Pratiques d'Économie sociale*, which published the *Bulletin de la Société d'Économie sociale*.
  13. In France, the first social economy forum was set up in 1977 by Henri Desroche at the Colloque du Comité National de Liaison des Activités Mutualistes, Coopératives et Associatives (CNLAMCA). In November 1978, a pre-colloquium held on the social economy in Brussels made it the subject of a Europe-wide debate (Desroche, 1983: p. 198).

1994). The resulting complexity is illustrated clearly by Henri Desroche's quadrilateral schema (Desroche, 1976: p. 337), which suggests the possibility of quadripartite democracy based on an internalisation of actors (members, employees, administrators and managers), resources and results elsewhere externalized.

**Table 2. Quadrilateral of actors in a social economy enterprise**



Source: Desroche, 1983

For such a complex relationship to be maintained despite the underlying great potential for conflict, it is necessary if not crucial to have an appropriate legal status that can ensure regulation through specific rules. The legal status most commonly provides the basis for the first definition of the social economy. This first definition has the advantage of rapidly identifying those organizations that face similar challenges. It does not, however, guarantee that the rules will in fact be put into practice. Moreover, it is possible that certain organizations experience similar complexity without having any one of the three identified legal forms (cooperative, non-profit or mutual society). That is why Henri Desroche added the concept of “uncertain characteristics” reflected in community enterprises, trade union enterprises, communal enterprises and public enterprises controlled by a democratic body (Desroche, 1983: p. 205).

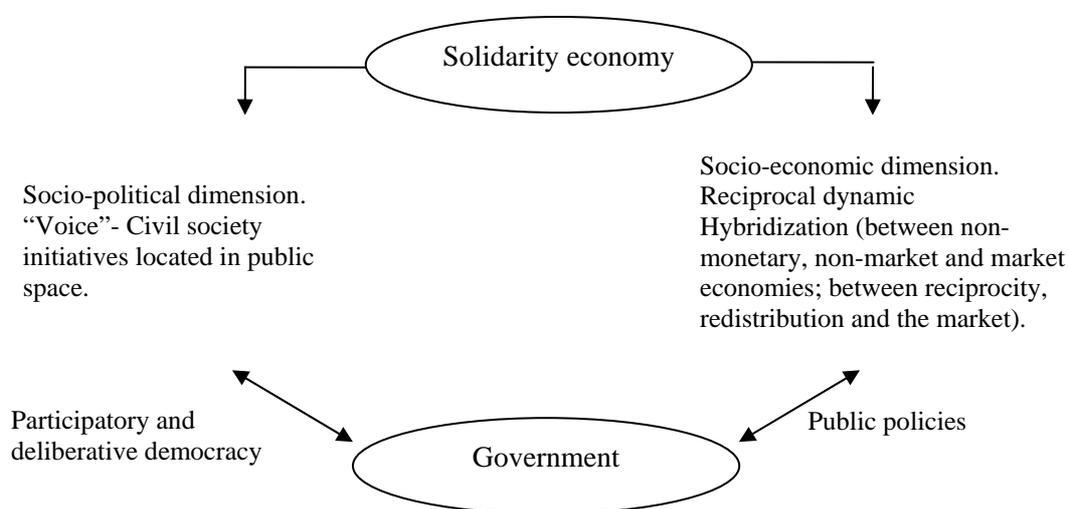
A second definition proposed by Claude Vienney goes one step further, with a systemic definition characterising the social economy in terms of actors (relatively dominated and thus affected in their daily lives and activities), of activities (activities that are socially necessary but satisfied poorly if at all by the State or by the market) and of at least four specific rules governing: 1) relations between members (democratic practices); 2) relations between members and the enterprise (determination of the activity by the members); 3) relations between the enterprise and members (distribution of surpluses or allocation of earnings); and 4) the enterprise or the goods/services producing entity as such (sustainable collective ownership) (Lévesque and Ninacs, 1997). In this definition, the social economy must not be confused with the informal economy, nor with the domestic economy (Lévesque et al., 1989: pp. 9-52).

### ***The solidarity economy***

Historical definitions have been questioned by a new generation of researchers who, beginning in the early 1990s, have offered a number of other definitions seeking *inter alia* not only to capture more clearly the new generation of associations, but also the context in which they emerged (Laville, 1992; Evers, 1995; Pestoff, 1995 and 1998; Favreau and Lévesque, 1996; Lévesque, Malo and Girard, 2001; Lévesque and Mendell, 1999). The originality of this research is that it goes beyond the operational dimension and adopts an approach that links the micro (the enterprise or organization) and the macro (the State and the

institutional context); in addition, it redefines the economic and political dimensions of the social economy. It highlights the fact that the new dynamic described above is emerging in a context of a crisis in Keynesian regulation (State-Market) followed by a reconfiguration of the welfare state and the restructuring of the economy in which civil society is becoming a complementary pole to the State and the market (Evers and Laville, 2004; Lévesque, Bourque and Forgues, 2001)<sup>14</sup>. From this perspective, the new social economy or the solidarity economy is not only defined as an economic activity with a social purpose, but it is also based on an expanded concept of the economy and of the political sphere (Dacheux and Laville, 2004). The social economy, by defining itself as a set of organizations, had left the wider question of its role in the economy and in contemporary democracies open. The current interest in exploring this role by researchers who have documented the multitude of initiatives that have emerged over the past two decades, has generated a perspective on the solidarity economy that renews its links to the origin of associationism. It is an approach that, rather than considering initiatives as organizations or collective enterprises, defines them in terms of their bi-dimensionality, which is at once both socio-economic and socio-political – as shown in Table 3.

**Table 3. The two dimensions of the solidarity economy**



Clearly, a major contribution of the solidarity economy approach stems from its socio-political dimension. In the nineteenth century, the extension of the market prompted reactions from society, which included the creation of associations and then the development of the welfare state. It is this historical process that Salamon (Salamon, 1987, 1990) recounted, emphasising that associations had in fact been the “first line of defence” (Lewis, 1997) erected by society, but that their shortcomings (insufficiency, narrow focus, paternalism, amateurism) forced them to forge co-operative links with the State. This functionalist explanation does exhaust the subject, as Salamon and Anheier (1996, 1997) themselves recognised when, following the Johns Hopkins project’s early research, they adopted a “social origins approach” in order to gain a better understanding of national situations through an analysis of their historical origins and development. The relationships between these initiatives and government are critical, because they have an impact on two political issues: the first which focuses on the potential for action by members of the political community as a whole; and the second that is centred more on the exercise of power (Maheu, 1991). All of the interactions between government and civil society initiatives result in mutual effects, the intensity and forms of which vary considerably over time. On one hand, the entrepreneurial initiatives of a diversity of social actors, by their very existence, participate in the evolution of forms of government regulation. On the other hand, the rules adopted by government influence the trajectories of initiatives. To

14. More broadly, see research by CRISES and CRIDA.

isolate organizations without grasping their relationships with the public sphere precludes understanding both their past and their future (Laville et al., 2005).

On the socio-economic level, the solidarity economy approach is supported by research showing that the economy cannot be reduced to the market, but that it includes the principles of redistribution and reciprocity. Instead of considering the economy from a formal neo-classical perspective, (rational calculation in situations of scarce resources and unlimited wants), the solidarity economy approach is inspired by Karl Polanyi (1944), and defines the economy from a substantive perspective, that includes the three economic principles of the market, redistribution effected primarily by the State, reciprocity and the gift in which civil society engages voluntarily (Mendell and Salée, 1990). This analytical framework is used as a reference by a variety of authors (Eme, 1991; Evers, 1990; Laville, 1994, 1992; Kramer, 1993; Pestoff, 1998, 1997, 1992) and has been the basis for territorial development research by the Organisation for Economic Co-operation and Development's Local Economic and Employment Development (LEED) programme (OECD, 1996).

The combinations of market, redistribution and reciprocity that characterize societies have varied historically (Polanyi, 1944). Contemporary society is no different featuring all three "patterns of integration": the market economy in which the distribution of goods and services is primarily the responsibility of the market; the non-market economy is one in which the distribution of goods and services is primarily based on redistribution controlled by the social state and the non-monetary economy in which the distribution of goods and services is based primarily on reciprocity. The solidarity economy approach emphasises the hybridization between the three patterns of integration that characterize contemporary economies but are generally not linked. From this perspective, it is by combining resources from each of these activities that social economy structures can protect themselves against the threat of trivialisation and marginalisation.

The mechanics of this hybridization underlying the solidarity economy approach, that links the economic dimension to the political dimension needs to be explained. In this approach, economic activities arise out of reciprocity (voluntary engagement) and recognition of the various stakeholders in which activities (goods or services) are jointly defined, especially in the case of proximity services, thereby creating public spaces allowing for the development of new ways of living together and reinforcing social cohesion (Eme and Laville, 1988, 1994, 1998-1999; Eme, 1991; Laville, Nyssens, 2000; Floris, 2004, Laville, 2004). This process involves substantial investment in a democracy that should be not only representative, but participatory and deliberative as well (Lévesque, 2003; Fung and Wright, 2003).

Researchers in this school define the solidarity economy as 1) a plural economy because of the plurality of principles and resources mobilised (Roustang, Laville, Eme, Mothé and Perret, 1997); 2) a component of a mixed economy of social welfare, meaning that it occupies an intermediate space between private enterprise, the State and the domestic sphere, thus highlighting both its socio-economic and its socio-political dimensions (Evers and Laville, 2004: p. 15); 3) a third sector which, while distinct from the State, private enterprise and the informal domestic economy, nonetheless overlaps with each of them because the boundaries between them are blurred (Pestoff, 1998).

Finally, the two meanings assigned to the third sector –non-profit organisations (NPOs) and the social economy – involve two theoretical approaches that are fairly different, and probably experiences that are different as well. The NPO approach considers the absence of profit-making the determining factor for voluntary organisations that seek to achieve objectives in the general interest or in the collective interest, whereas for social economy organisations, it is the democratic process and stakeholder participation that permit the achievement of these objectives, even if some or all of their activities are market in nature. More recent analyses of the solidarity economy tend to question the idea of a sector with rigid boundaries, in the name of an expanded conceptualization of the economy as a plural economy, and of politics as a public

space. For this and other reasons, they also question the proposal of Salamon and Anheier (1998) to make the third sector a sector of civil society, considering it rather as an intermediary space (Evers, 1995 and 1998; Evers and Laville, 2004: p. 21). In sum, the solidarity economy is participating in the constitution of a “new regime of governance of the general interest” mobilising the State and its agencies in a novel manner, the market through enterprises and civil society, *inter alia*, via voluntary associations (Lévesque, 2003; Enjolras, 2004).

### ***Similar concepts for a contrasting reality***

Unlike in Quebec, the social economy concept is used very little elsewhere in Canada (Quarter, 1992), but other, similar concepts point to a comparable reality. Among those concepts, that of community economic development (CED) has been the most widespread since at least the mid-1980s (Compfens, 1998; Fontan and Shrage, 1997; Broadhead, 1994; Hudson and Galaway, 1994; Boothroyd and Craig, 1993; Favreau and Ninacs, 1994; Ross and McRobie, 1989). It is frequently 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 highlights the importance of a model of governance that can mobilise the various components of civil society and other stakeholders, such as business and government, in order to define a perimeter of solidarity (Fontan, Klein and Lévesque, 2003). According to some scholars, the place occupied by community participation in CED is strategic not only for the success of the approach but also for its identification with the social economy (Morin, Latendresse and Parezzelli, 1994). CED questions mainstream approaches to development, including the separation between the economic and social spheres. In this regard, definitions constitute a conceptual reference: that formulated by the OECD (1999) and the EMES network (Borzaga and Defourny, 2001), and that put forward by the British Government in 2002 (Ecotec, 2003).

Another concept that is relatively close to that of the social economy is “social enterprise”, which is increasingly being used in the United States, England and Europe (Bornstein, 2004; Eunson, 2003; Emerson, 2001; Brady, 2003; Harding, 2004; Defourny, 1999; Dees, 1998). A social enterprise has a social objective targeting community development or the satisfaction of social needs. There seem to be two prevailing trends: the first case that is predominant in Europe, recognises the social dimension of enterprises, reflecting the evolution of a complex of enterprises increasingly referred to as the social solidarity economy; in the second, which has taken root in the United States (Baldelt, 1997; Dees, 1998), the notion can be used to describe non-profit organisations (NPOs) with more and more commercial activities or entrepreneurial features. Other research focusing on the profile of social entrepreneurs – hybrid individuals that are at once entrepreneurs and social militants, highlights the special difficulties confronting these social entrepreneurs, including access to financing, lack of solid grounding in the business community, and so on (Lévesque, 2002; Badelt, 1997; Thake and Zadek, 1995).

The emphasis on social enterprise (and subsequently on social entrepreneurs) opens up a debate on the transformation of associations – a debate raising important questions that are not always clearly defined. Research has focused primarily on the activities of these enterprises and their financing, but it poses very few questions about their capacity for autonomy vis-à-vis the market or State funding. For NPOs, the concept represents a sort of dilemma insofar as the term “enterprise” connotes market activity. For the social economy, the concept raises fewer questions about market activities than about autonomy, relationship to the community and democratic process. Moreover, this notion orients research to intervention on the micro level, disregarding the fact that a social enterprise can contribute to the reshaping of the welfare state, or to the economic reconversion of territories.

Lastly, the notion of social innovation is associated more and more with the concepts of social enterprise and social economy. Social economy organizations and enterprises are believed to be a greater

source of social innovations for the good reason that they generally emerge in order to satisfy needs that are met poorly if at all by the market or the State (Lévesque, 2002a; White, 1982; Zimmermann, 1999). Their roots in the community and proximity to certain social groups allow them to identify needs and opportunities more quickly than others (Fontan, 1998). Likewise, their structure, which encourages the participation of various stakeholders, is conducive to the circulation of information, and thus to the emergence of new ideas and new projects. Even so, social economy associations and enterprises are rarely aware that they are innovating, since they do so spontaneously. For this reason it is useful to identify these innovations, describe them and study the conditions under which they emerge and spread. For this purpose, social innovation can be defined as “any new approach, practice or intervention, or any new product that is developed to improve a situation or to solve a social problem” and that “has been adopted by institutions, organisations or communities” (Bouchard, 1999; CST, 2001, 2001a, 2000, 2000a). To sum up, a social innovation is no doubt a social and socio-economic experiment, but an experiment that has succeeded and that can be replicated elsewhere (Chambon, David, Devereux, 1982). As a result, if social innovation must prove its social utility, it can certainly be validated via the market, but also via its institutionalization, through public services and the social economy.

From this perspective, social innovations are seen not only as organisational innovations, which are fairly commonplace, but as institutional innovations as well, which are less commonplace, or as new institutional arrangements, new rules for social and socio-economic regulation or new ways of resolving social and socio-economic problems. Thus, government policies adopted recently in Europe, Canada and Quebec in favour of the social economy, while still modest, are institutional innovations that create conditions conducive to its development. They are the result of a process of negotiation between actors in the social and solidarity economy and respective governments, and a shift from community action to public action (Laville et al., 2005). The hybridity and intersectorality of the social economy demand horizontal government policies in contrast to the silo approach in most ministries. New political bodies, including intersectoral boards, are new and unique forums for discussions and debate; they represent one of the elements of a new institutional context and the co-production of public policy by all stakeholders. Lastly, it must also be added that social innovations are present not only in the social domain but also in the economic domain; not only in social economy associations and enterprises, but also in the private sector and in the public sector.

## **Conclusion**

This paper highlights the great diversity of experiences in the social economy and of the theoretical approaches that attempt to describe them. This diversity can be observed in a variety of practices in different countries, as well as in different regions, as is illustrated clearly by the case of Quebec and its influence on the rest of Canada. These socio-economic initiatives, regardless of what they are called (“social economy”, “solidarity economy”, “third sector” or “third system”), are an integral part of a new political economy that recognises the importance of the social in the economic, that makes the initiatives of civil society visible and legitimate and, more recently, that reflects citizen demands for a more responsible economy. From this perspective, the social economy is increasingly being recognised not only for its stated objectives (satisfaction of unfulfilled needs), but also for its potential for transforming our societies and our economies, including its capacity, from today, to fulfil hopes for another form of development, for another globalisation.

More specifically, the social economy potentially represents a space for social innovation that is decisive both for social development and for economic development, especially through local development. However, from the perspective of research on the social economy, many questions remain unanswered, since this potential is not always tapped, nor can it be in the absence of enabling conditions that are increasingly documented, and which require the contribution of the State, and the market. Some research focuses primarily on enterprises and organizations (micro perspective), such that the main

questions asked concern the compliance of practices with the values and principles advanced. Other research focuses instead on the role of the social economy in society, and on the role ascribed by the State (macro perspective). Research that successfully and convincingly links both levels of analysis is scarce. It seems to us that the most strategic questions lie at the interface between these two types of approaches. Our paper cannot escape this difficulty, although the focus has been primarily on a review of the institutional context, of the relationship with the State and civil society and the respective roles of the State and the market.

The diversity and multiplicity of initiatives and the institutional contexts in which they are located require new methodologies of evaluation and new indicators for reporting on economic as well as social returns; quality of service as well as working conditions; and the contribution to social capital as well as the strengthening of democracy in organisations and local areas in which the social economy is present. This great diversity and multiplicity suggest the high relevance of comparative analyses, not only between sectors of activity but between countries and regions as well. Moreover, the state of research also seems to reveal that the institutional context, the dynamism of social movements and their capacity to forge favourable alliances are decisive factors influencing the relative size and dynamism of the social economy in any given society. We can hypothesise that the macro-sociological and macro-economic scope of the social economy lies primarily in its capacity to question both the market and the State from the standpoint of the efficiency and quality of services and the democratization of community services and production. As stipulated by the solidarity economy approach, the political space occupied by the new social economy clearly reveals the growing importance of civil society initiatives in the economic sphere, obliging us to transcend a bi-polar vision centred exclusively on the market or on the State. Lastly, it would be impossible to neglect the impact of research, and in particular of research carried out in partnership, on its institutionalization and recognition by government. In many cases, this involves the co-production of public policies involving researchers, actors and government agencies alike.

In the process of institutionalising the social economy, the definition or contours of the social economy is a political issue that is still open, although the trend is towards closure. Insofar as researchers study the social economy in partnership with the actors in the social economy, they reap many benefits, since they can have direct access not only to the field, but also to so-called “tacit” knowledge, not to mention the active participation of partners in the codification of this knowledge. However, partnership should not prompt researchers to abandon more fundamental research – a critical component of their work, the questions of which are provided mainly by the interests of research, and which seeks to answer questions whose impact is not immediate. More explicitly, we would say that research carried out in partnership demands making the link between fundamental and applied research, between the short term (that of urgency ) and the long term (that of opportunities). Here, research carried out in partnership cannot be fully satisfactory for all stakeholders unless it is likely to succeed in answering the most concrete and immediate questions, but also in advancing knowledge about society and the economy, departing from the beaten path to catch a glimpse of prospects for the future.

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Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA)  
<http://www.arnova.org/>

Caledon Institute of Social Policy  
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Canadian Centre for Policy Alternatives  
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Centre de recherche en innovation sociale dans l'économie sociale, les entreprises et les syndicats (CRISES)  
<http://www.cris.es.uqam.ca>

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<http://www.crida-fr.org>

Centre de recherche sur les politiques et le développement social (CPDS)  
<http://www.criteres.umontreal.ca/> and <http://www.politiquessociales.net/>

Centre interdisciplinaire de recherche et d'information sur les entreprises collectives (CIRIEC)  
<http://www.ciriec.uqam.ca/>

Chantier de l'économie sociale  
<http://www.chantier.qc.ca>

Chantier franco-québécois sur l'économie sociale et solidaire  
[www.unites.uqam.ca/econos/](http://www.unites.uqam.ca/econos/)

Community Development Finance Authority (CDFA)

<http://www.nhcdfa.org>

Community Economic Development Across Canada

<http://www.cedcanada.ca/>

EMES European Research Network on the Emergence of Social Enterprises in Europe

<http://www.emes.net>

European Confederation of Workers' Co-operatives, Social Cooperatives and Participative Enterprises (CECOP)

<http://www.cecop.coop/welcome.html>

European Network of Cities and Regions for the Social Economy (REVES)

<http://www.revesnetwork.net>

Finance et solidarité (Finansol)

<http://www.finansol.org/>

Gateway to the European Union (EUROPA)

<http://europa.eu.int/>

International Association of Investors in the Social Economy (INAISE)

<http://www.inaise.org>

International Society for Third-Sector Research (ISTR)

<http://www.istr.org/>

Johns Hopkins Institute for Policy Studies (IPS)

<http://www.jhu.edu/~ips/>

Laboratoire Interdisciplinaire pour la Sociologie Économique (LISE)

<http://lise.iresco.fr>

Learning Enrichment Foundation

<http://www.lefca.org/>

Mouvement pour l'économie solidaire (MES)

<http://le-mes.org/>

New Economics Foundation

<http://www.neweconomics.org>

Tamarack Institute

<http://www.tamarackcommunity.ca>

Vibrant communities

<http://www.vibrantcommunities.ca>