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In Search of...

Exploration of the boundaries, scope and definitions of the social economy: a discussion paper

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About the Network

The Social Economy and Sustainability Research (SES/ESD) Network is the Atlantic Node of the Canadian Social Economy Research Partnerships (CSERP) — one of six regional research centres across Canada, funded by the Social Sciences and Humanities Research Council of Canada (SSHRC), 2005-2010. The Network has a wide variety of academic, community and government partners representing Nova Scotia, New Brunswick, Prince Edward Island and Newfoundland and Labrador. / For more information, contact us:

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The SES/ESD Network will periodically publish research papers about our research in Atlantic Canada. The papers will be written by both academics and social economy practitioners. The SES/ESD Network hopes these papers will contribute to the theory and practice of social economy within the Atlantic Region. Noreen Millar is the Network Coordinator and Managing Editor of the Working Paper Series. Papers in this series are not formally peer reviewed, but are products of Network-approved and managed research projects.

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Introduction

As part of the activities of the Atlantic Node of the pan-Canadian Social Economy and Sustainability Research Network, the public policy working group (Sub-Node 1) initiated a project to map and provide an inventory of provincial legislation, policies, programs and initiatives that are directly relevant to community economic and social development, the social economy, and building the capacity and opportunities for engagement in policy formulation and implementation in the Atlantic region. Part of the complexity of researching policies that support and develop the social economy or improve and build relationships between governments and social economy organisations is the lack of agreed definition of what the 'social economy' is. Or, rather, the diversity and number of descriptions, typologies of organisations and scope of activities making up the social economy that are available to draw on. An extensive, albeit not exhaustive, review of available literature has been made to support the policy scan and research to consider definitions of 'social economy', 'social enterprise' and 'social economy enterprise', 'social capital' and 'public policy'. In this discussion paper, the definitions provided by a number of authors and organisations are examined. While not providing an overall agreed definition, they do help to provide key characteristics (and to some extent boundaries) of the concept. From this review, an outline of primary and supporting characteristics is suggested to provide a starting point for further dialogue on what the 'social economy' looks like in Atlantic Canada. This discussion is further examined and explored in a subsequent Sub-Node working paper, *Mutual [Mis]Understandings: exploring the boundaries of social economy activity in Atlantic Canada.*

Resistance to Definition

There are many discussions in the literature about the merits and limitations of providing a concrete definition of the 'social economy', partly because of its history and development and partly in relation to its evolving and changing nature. The search for identity has included discussion about the labelling of the social economy as 'a sector'; the constituent parts of 'a' sector or whether there is more that one sector within an overarching framework; how the sector is defined (or not) by its name; and attempts to provide clear definitions by revising and refining "old" labels or to find "new" labels (for overviews of the history and development of the social economy/l'économie sociale, see for example: Chaves and Monzon, 2007; Defourney, 2006; Fecher and Lévesque, 2008; Lévesque, 2007; MacPherson, 2008; Monzon and Chaves, 2008: Moulaert and Ailenei, 2005 In relation specifically to Quebec, see for example: Mendell, 2003; Neamtan, 2005; Vallaincourt, 2006).

If we look at the development of social economy organizations in particular countries, we can see that these sectors might look quite different and have different stories about their historical development. This is often linked to trends in government involvement in welfare state activity, the extent of market economies, privatisation of health and social services, and the stringency of the requirement of codification in law (Myers and Sacks, 2001). In this way, we might see the

development of aspects of the social economy as being responsive to lack of government services. Social economy organizations, particularly those concerned with social care and health and well-being may be seen as supplementary or complementary to government provision of services. They may be adding value to existing provision or indeed, they may be residual - providing a stop-gap or safety net – reacting to and highlighting a lack of adequate service provision by 'the state'.

Proactive social economy organizations may be entrepreneurial in their approaches to searching out and finding solutions to social and economic problems in particular areas, and in their organisational design and approach to development and provision of goods and services. They may supplement existing services or, indeed, provide alternatives to both government and private sector provision through local control and/or ownership of assets and services. They may follow philanthropic or charitable non-profit approaches, or they may look to enterprising models of income generation and payment and subsidies for services. In effect, all these organizations contribute to the construction of a socially and economically active and effective space, which we might call the social economy..., or community economic development... or the third sector... or the fourth sector... or the not-for-profit sector... or...

A further problem associated with definition seeking is whether individuals or organizations identify as being part of a 'social economy' or a social economy organization. When we look at individuals' involvement in their local communities, those individuals may not consider the notion of volunteering or define themselves as volunteers. They may see themselves as 'caring neighbours' or 'helping to coach the local team' but not as someone adding value to their local economy as part of an informal sector of support, i.e. as part of a 'social economy'. This lack of identification and 'hidden' activity can make assessing overall contribution of and participation in the social economy difficult. From my own experience of working in the 'third sector', this has been employment and engagement with non-profit distributing[1] voluntary and community organizations in the UK, Europe and Canada. I have also worked in worker co-operatives and consumer co-operatives, which I have not perceived as being part of the third sector (although I was a volunteer in a community-based food co-op), but also not part of the mainstream business or for-profit sector. They were commercial enterprises, but with different aims and motives to investor owned companies, and attempting to find alternatives to ways of 'doing business', to employee relations and engagement, and impact on local communities. This personal experience also reflects some of the historical discussions about the nature and development of a 'third sector' and of a social economy, which also resonates with a UK and to some extent English Canadian perspective. The social economy then, as with beauty, may well be in the eye of the beholder.

[1] Even non-profits aim to make a 'surplus' to plough back in to existing or new services whether they income generate through sale of services/goods, and contracts, or they rely on 'unearned' income – such as grants, charitable giving and donations, even if they choose not to distribute this surplus among members or to service users/customers.

What this highlights, as Grint points out in considering the nature of the world of "work", is that what is important is "not what that world is, but what those involved take it to be" (1998, p 2). We can readily apply this to the world of the 'social economy'. As such, the world or worlds of the social economy in which many people live and work can be seen as socially constructed and reconstructed concepts in relation to past and present definitions, situational contexts, social and economic conditions and power relations. This means that the shape, size and constituent organizations that make up the social economy will be different according to the geographic location, legislative frameworks and governmental relations and support for social economy organizations, the perception of needs and gaps in a particularly society or community, the key actors in a location, and the role of social economy organizations in relation to public (government) and private sectors. We may see, for example, in some locations high numbers of volunteer-run services with limited numbers of voluntary and community organizations staffed and run by paid employees; or we may see a high concentration non-profit voluntary and community organizations compared to co-operative and mutual associations. We may see a co-operative sector mainly concerned with economic activities and mutual efforts to support the business needs of, for example, dairy farmers or agri-food producers, rather than human service organizations such as housing co-operatives.

This might mean if we define the social economy according to a set of perceived activities in one locality, application and generalisation of the definition may not be achievable when applied to another locality or to constituent parts of the social economy elsewhere. Better then to resist definition and to scope the boundaries of what is, what could and what is not the social economy to provide a fluid and flexible approach to identifying and maintaining control over the concept?

Before moving on to scope the social economy – and by this I mean examining what is included or excluded from the concept – it is pertinent to consider some of the arguments that are put forward to reduce resistance towards definition. Let's consider the utility of definition.

Some see the exercise of defining 'a' sector as purely instrumental: a way, for example, to identify sector characteristics that can be measured and evaluated and certainly this is an important piece of work as it helps to establish the 'place' of social economy organisations as contributors to the overall economy and well-being of a locality, region or country. For example, we can look to the Centre for Civil Society Studies at the Johns Hopkins Institute for Policy Studies where there have been a number of systematic and comparative country analyses to build up a profile of the scope, structure, financing and impact of non-profit organizations in 46 countries and which provide defining characteristics of the sector and its component activities.[2]

There have been similar profiles of the non-profit sector in Canada – most notably the 2003 national survey of non-profit and voluntary sector organizations[3] which collected data on numbers of organizations and geographic distribution, areas of activity, populations served,

[2] See Comparative Nonprofit Sector Project web pages at http://www.ccss.jhu.edu/index.php?section=content&view=9&sub=3
[3] For downloadable copies of the reports produced as part of this survey, visit http://www.vsi-isbc.org/eng/knowledge/nsnvo.cfm

extent of public benefit, financial and human resources and capacity to fulfil their missions. A report, published in 2006, provided a summary of the survey in relation to the Atlantic Provinces (Rowe, 2006) and more recently a new project is underway to measure the economic impact and contribution as well as the human capital needs of the voluntary and community sector in Nova Scotia.[4]

At an international level, there are a number of surveys and documents relating to the size and economic contribution of the voluntary and community sector, including national accounts systems, which provide periodic accounts of economic activities on a country basis (see for example, Chaves and Monzon's, 2007, discussion of the United Nations System of National Accounts and the European System of National Accounts). Here, again, we can identify the economic impact of one part of the social economy as 'non-profit institutions serving households' are one of the institutional sectors measured in these indices. However, as Chaves and Monson note, other key constituents of the social economy, namely "co-operatives, mutual associations, associations and foundations are scattered" across all the institutional sectors (non-financial corporations, financial corporations, general government, households (as consumers and entrepreneurs, and non-profit institutions serving households) "making them difficult to perceive" (2007, p 18).

Some co-operatives and mutual associations are seen to more akin to for-profit organisations, as we can see from the classification above, and are obscured by inclusion in industry sector categories (finance, agriculture, manufacturing for example), rather than organisational (or legal) forms of organisation identity. There has been some work in Atlantic Canada to map the scope and profile of co-operatives and credit unions (Brown, Hall and Thériault, 2006; Thériault, Skibbens and Brown 2008) and we can look towards the International Co-operative Alliance for statistics similar to those collected by the Johns Hopkins Institute for the economic significance of co-operatives in the world. However, the ICA Global 300 reports on the largest co-operatives (similar to Canada's Top 500 corporations), which for Canada consists of the co-operatives listed in Table 1.

[4] This work is being carried out by Phoenix Youth Programs and the Federation of Community Organizations in Nova Scotia and is funded by the Human Resource Social Development Canada. See www.foco.ca

Table 1: Largest Canadian Co-operatives (ICA Global 300, published 2008

Turnover and asset figures are for 2006 (USD millions)

Co-operative	Rank	Description
Desjardins Group	33	Finance: leading financial group in Quebec. Turnover UD$8072; assets US$116058. www.desjardins.com
Federated Co-operatives Limited	55	Retail: largest non-financial co-op. Turnover US$ 4822m; assets US$2389m. Ranked 65th in Canada's Top 500 corporations. www.fcl.ca
Coopérative Fèdérée du Québec	92	Food & agriculture: wholesaler, food processer, access to local and international markets for farmers in Quebec, Ontario and New Brunswick. Turnover US$2826; assets US$894m. www.coopfed.qc.ca
The Co-operators	118	Insurance – multi-product insurer, over 650 outlets and 900 independent brokers, 3 call centres. Turnover US$2140m; assets US$6010m www.cooperators.ca
Agropur	124	Food & agriculture: largest dairy co-op in Canada – 21 plants (1 in USA) processing 1.9 million litres of milk each year. Turnover US$2034; assets US$753m. www.agropur.com
United Farmers of Alberta	172	Agriculture and supplies: 35 farm & ranch supply stores and over 120 gas outlets. Turnover US$1385m; assets UD$497m. www.ufa.ca
SSQ Financial Group	199	Finance group: insurance, property, investments. Turnover US$1192m; assets US$1684m. www.ssq.ca
Calgary Co-operative	264	Retail: locally owned and operated with over 400,000 members. Turnover US$787m; assets US$ 279m. www.calgarycoop.com
La Capitale	290	Insurance: holding company of the civil service mutual in Quebec. Turnover: US$646m; Assets: US$2006m. www.lacapitale.com

Source: ICA (2008) Global 300 available from: http://www.global300.coop/sites/global300.coop/files/08/G300_08.pdf

There is not the same visibility for smaller and non-market co-operative and mutual associations although some statistics are held federally as part of the Government of Canada Co-operatives Secretariat (http://www.coop.gc.ca/COOP), by provincial bodies such as Service Nova Scotia Co-operative Branch (http://www.gov.ns.ca/snsmr/coop) or Nova Scotia Co-operative Council (http://www.nsco-opcouncil.ca/coops_mem_quickstufffood.php) and by infrastructure or apex organisations such as the Canadian Co-operative Association (http://www.coopscanada.coop).

The same can be said for small voluntary and community sector organisations and community enterprises. Here visibility is helped by infrastructure and local development agencies, such as Community Services Council Newfoundland and Labrador (www.envision.ca) and recently established government secretariat such as New Brunswick's Community Non-Profit Organizations Secretariat (http://www.gnb.ca/0012/CNPO-OCSB/index-e.asp). In this way, providing a defining concept to which organizations and activities can be identified as belonging, helps provide visibility and a means to measure and evaluate. As Brown *et al* (2006, p 3) suggest:

> Decisions about typologies and categorizations are not trivial - they guide scholarly theorizing, research and the presentation of data, they have significant policy consequences, and they affect the way [social economy] organizations see themselves.

Scoping the social economy

Scoping and accounting for the diversity and make-up of the social economy can provide visibility to a wide range of activities and organizations – formal and informal, large and small, market-oriented and non-market oriented. As can be seen from the discussion above, we have started to identify different aspects of what we might term a 'social economy' – co-operatives and mutuals and voluntary and community organizations. Within each of these broad categories are sub-sectors of different types of voluntary and co-operative activity. As is necessary in scoping the sector, the closer we look the more complex the situation becomes and some of the boundaries of what types of organization are included or excluded become fuzzy under close scrutiny. So, for example, in some descriptions of 'social enterprise' which we can take to be an entity included in the broader social economy, it is possible to include 'more than profit' organizations (Jones *et al*, 2004) and 'for-profit companies that redistribute a portion of their profits in the community' (Bouchard *et al*, 2006 p 5). When taken as its most general, this latter statement could well include private, shareholder companies that include good corporate, environmental and social responsibility as part of their strategies. This, in turn, may mean for example, employees giving volunteer time to local communities or setting up a charitable trust or foundation to provide funding to local volunteer group.

We must not confuse corporate philanthropy with social enterprise especially where the impetus and means of providing charitable giving has been through private ownership and enterprise initially geared towards private gain and wealth creation. This does not deny that many of these foundations/trusts provide the impetus and resources for social economy organizations and enterprises and have considerable impact on the quality, innovation and range of services available as did their predecessors, the Victorian philanthropists. However, Bouchard *et al* (2006) qualify their statement with an example – a relatively newly minted legal form of organization in the UK, the community interest company: an organizational form to specifically help social enterprises, but also charities and others to carry out market and non-market activities under a more streamlined registration, accounting and reporting system[5]. This is clearly an area for some continued debate.

Bouchard *et al* (2006) rightly state that 'organizations in the social economy do not constitute a homogeneous group' (p 5) although curiously the authors suggest that profit enterprises do. If we look at the private sector then we can see sole-traders, family-owned business, small-medium sized enterprises, large national companies and conglomerates, international consortia, transnational and global organizations. If we look at an industry base we can see, for example,

[5] Charities which carry out some kind of trading or market activity are also usually registered as companies limited by guarantee as well as being a registered charity. Charities relinquish their charitable status in order to re-register as a community interest company. Some co-operatives have also used this form to register. It is specifically designed for social enterprises and there are two types – limited by guarantee and limited by shares. There is a 'community interest test' aimed at CIC's actively demonstrating community benefit, and there is an asset lock. However, the new Charitable Incorporated Organisation (CIO) aimed specifically at charities means charities will have the benefits of a company limited by guarantee and a charity without having to report to both Companies House and the Charity Commission. Registration and reporting will be through the Charity Commission and may well become a preferred option for those not wishing to lose their charitable status.

manufacturing, education providers, social and health care providers, and so on. In fact, we can see a whole host of organizational forms, structures and ways of working – for example those companies that look towards engagement and participatory structures such as open book management and employee stock ownership plans (ESOPs – such as those operated by Westjet Airlines). Similarly, the public sector is not homogeneous in its organisational forms, delineation of services, activities, cultures and associated professional languages. Nor, is a voluntary sector or social economy organization necessarily any more virtuous or philanthropic than private and public sector organizations in promoting social inclusion, community participation or, for that matter, any better in including people who use their services in the management, shaping and delivery of those services. Furthermore, we can see why it might be argued that a small-medium for-profit enterprise (SME) offering computer training and services to unemployed people may have more in common with a non-profit computer training agency(a SMVE: A small-medium voluntary enterprise?) or co-operative than with a larger provider such as IBM (Clutterbuck and Dearlove, 1996). Similarly, large trans-national nonprofits might find common ground with multi-national companies in terms of negotiating with different governmental regimes, cultural issues and regulatory frameworks.

With increased privatization of public services and the push towards a mixed economy of social and health care, the continuing blurring of boundaries between public and independent (i.e. non-government and private sector organizations) can create a discernable tension between whether to be similar to or different from other organizations. In reference to this, Lewis (2001, p 32) cites Turner and Hulme's (1997) phrase of the "Janus-like quality" of language that organizations may use "which can combine the rhetoric of Freirean transformative ideology for radical supporters at one moment, and the market rhetoric of enterprise culture for government, business and donors, the next".

It makes sense then to try to delineate, to provide boundaries to the concept of 'social economy' and to scope the types and characteristics of organisations that inhabit this landscape. This is especially so given the growing interest and attention being given to social economy organisations in policy arenas, particularly in the light of growing "dissatisfaction with the inadequacies of both the market and the state in their ability to cope with complex social, economic and environmental problems" (CPN, 2000 p 1). This is all the more pertinent given the move towards stakeholder involvement in planning and delivery of services to the public and a move to more participatory and networked governance: active alliances across sectors that mark a shift from "traditional hierarchical relationships' to "negotiated arrangements" between sectors (Brock, 2009).

In carrying out the policy scan as part of the Social Economy and Sustainability (SES) Network Sub-Node's review and inventory of jurisdictional policies, programs and activities that support social economy organizations at municipal, provincial and federal levels, a characteristics, spectrum based approach was taken, despite the SES Network having a working definition of social economy organizations (Brown 2008). It was thought to provide enough of a platform for

study, practice and identity claims and would also allow for examination of emerging or recurring definitions of the social economy in accessed policy documents. Indeed, many of the definitions of the social economy include descriptions of the organisations that are seen to be encompassed within the umbrella terminology (McGrath and Myers, 2009). See Appendix 1 for a full list of definitions of the social economy, including Brown 2008 and Thériault, 2006).

For the purposes of the policy scan, organisations[6] given as examples of the range and type represented in the social economy, included:

- Co-operatives – market (including profit distributing companies) and non-market (non-profit distributing or non-profit), which includes consumer co-operatives, worker co-operatives and stakeholder co-operatives. For example, in Nova Scotia an example of a co-operative business linked to fair trade principles would be Just Us! Coffee Roasters Co-op. A 'non-profit' co-op example would be Team Work Co-operative

- Umbrella or membership organisations such as the Nova Scotia Co-operative Council and networks/associations of organizations such as the Coastal Communities Network

- Voluntary sector development and infrastructure agencies such as Community Services Council Newfoundland and Labrador and Federation of Community Organizations, Halifax Regional Municipality

- Voluntary organizations and associations such as Mineville Community Association and national organizations, some with local branches such as National Aboriginal Diabetes Association

- Volunteer, self help and community groups such as Dartmouth Stroke Support

- Clubs and Societies such as Fredericton Freewheelers

- Credit unions/caisses populaires such as Caisse populaire Sud-Est in Shédiac New Brunswick, part of the Caisses Populaires acadiennes or Credit Union Metro, Charlottetown, Prince Edward Island.

- Social firms (or 'affirmative business'), such as LakeCity Employment Services in Nova Scotia, whose enterprises include LakeCity Woodworkers, reBOOT NS, and the TREES project

- Social and/or community enterprises (other than co-operatives), such as the Rising Tide Theatre Company, in Newfoundland and Labrador

[6] The spectrum consisted of formal organizations as opposed to individuals and family/friendship networks and ad-hoc campaign networks, which as we will see later do form important constituent parts of a social economy.

As with 'social enterprise', the 'social economy' is regarded as having two dimensions – 'social' and 'economy'. The social dimension includes: concepts of solidarity; proximity services; the public sphere and public good; networks and social capital (reciprocity); acting as vehicles towards combating poverty, social and financial inclusion (credit unions, micro-finance) and responses to key social needs and social situations (aid agencies, housing and homelessness); social and cultural development; and advocacy (politics, campaigning and in some cases dissent).

The economic dimension includes: production of good and services; 'capital' (human, social); focus on efficiency; pre-dominantly market orientation; creation of new wealth (rural and urban regeneration and community economic development); capital anchoring (retaining resources in communities); new opportunities (sustainability, eco-); and elements of 'competing' (with the state, private sector companies, and in some instances other social economy organisations); 'complementing' (existing goods and services); 'supplementing' (additionality and value-added services).

From these dimensions, we can start to consider the different characteristics associated with the social economy and social economy organisations.

Seeking definitions

As stated earlier, an extensive but not exhaustive literature search was undertaken as part of the policy scan. The focus was mainly on definitions and descriptions available in Canadian literature or with sources most often used or quoted. A list of 70 definitions and their sources is included in Appendix 1. Characteristics found in each of the definitions and repeated have been identified and are shown below in Table 2. Some of these characteristics form clusters, such as 'ownership and control' (e.g. independent from government plus independence/autonomy/self-governed/self-organization) – not identified in the Table but discussed below.

As suggested earlier, many of the definitions describe the organizations that are found within the social economy, their organization type, (legal) form, and processes, and the range of activities undertaken rather than the 'social economy' per se. Of those that do offer a definition of social economy they often refer to its economic and social dimensions (as mentioned above) or in terms of its association with another related phenomena. For example, there are some who refer to the social economy as synonymous with 'third sector' (e.g. Defourney 2006; MPEN n.d.; Moulaert and Ailenei, 2005; Salkie, 2005; and Tremblay, 2009); with 'community economic development' (e.g. Cote *et al*, 2007; Lévesque and Mendell, 2004; and Loxley and Simpson, 2007;); with civil society'(Bakopanos, in Co-operatives Secretariat, 2004); and with not-for-profit sector or community non-profit sector (Government of Canada; BCSER, 2008: Cote *et al*, 2007; Amin cited in Graefe 2005 and 2006; Martin's 2004 speech to the Throne; Tremblay, 2009; Walker, 2008; CWES, 1990; Western Economic Diversification Canada, 2005).

I will return to these associations later, but first I want to look more closely at the similarities and differences between the definitions and descriptions offered. As one might expect, in a relatively close-knit community of practitioners and academics associated with social economy thinking and action there are shared ideas and diverse political viewpoints on the nature and substance of the social economy. Working only from the condensed definitions given in published articles and reports we can see from looking at Table 2, individual and similar groupings of key characteristics.

Each of the characteristics identified are numbered not in priority order but for ease of identification and reference. Details of sources and the complete definitions are provided in Appendix 1.

Table 2: Dimensions of the 'social economy'

	Characteristics	Source
C1	Economic and social/ social mission/social mission with economic value/ non-market-market/people before profit	ARUC-ES/RQRP-ES; Brock and Bulpitt; Brown; Brown *et al*; Thériault; CCEDNet; CSCN&L; Co-op Secretariat; Côté; Davidson; Defourney; EQUALSET; EMES; Evans; Amin; HRSDC; Karaphillis; Lévesque and Mendell; Martin; Ninacs and Toye; Restakis; Ryan; Vaillaincourt; CWES
C2	Production of goods and Services/carrying on economic activity	ARUC-ES/RQRP-ES; Bouchard *et al*; Thériault; Moulaert and Ailenei; Painter; Wynne *et al*
C3	Production of goods and services for the market economy	Government of Canada; BCSER; Chaves and Monzon; CSCN&L; Economic Development Canada; Hebb *et al*; Monzon and Chaves; Restakis
C4	Not-for-profit sector/community non-profit	Government of Canada; BCSER; Côté *et al*; Amin; Martin; Tremblay; Walker; CWES; Western Economic Diversification Canada
C5	Third sector	Defourney; MPEN; Moulaert and Ailenei; Salkie; Tremblay
C6	**Voluntary organizations**, **registered charities**. Incorporated non-profits. **Co-operatives**. **Credit unions**, **mutual insurers, mutual societies**, **community economic development corporations**, unincorporated formal **associations/social enterprises**, **foundations**, non-governmental organizations, volunteer organisations, communal enterprise, **community enterprise**, joint enterprise, actively trading voluntary organizations, **some profit-making firms/for-profit enterprises/business enterprises;** unions; Land-based activities	Brock and Bulpitt; Brown *et al*; CSCN&L; Co-op Secretariat; Côté; Defourney; Desroche/Bouchard *et al*; EMES; Favreau; Fontan; HRSDC; Kay; Mendell; Moulaert and Ailenei; Neamtan; Painter; Restakis; Smallbone *et al*; Salkie; Torjman; Walker; Western Economic Diversification Canada: Wynne *et al*
C7	Not for personal profit	Brown; Davidson; Evans
C8	Redirect surpluses in pursuit of social and environmental goals/ rules prohibiting or limiting distribution of surpluses amongst members/non-profit distributing	Government of Canada; BCSER; Bouchard *et al*; Brock and Bulpitt; Brown; Chaves and Monzon; CNLAMCA; Co-op Secretariat; Côté; Defourney; Economic Development Canada; HRSDC; Mendell; Monzon and Chaves; Vienney
C9	Independence/autonomy/self-governed/self-organisation	Chaves and Monzon; Defourney; EMES; Evans; Mendell; Neamtan; Quarter *et al*; Western Economic Diversification Canada

	Characteristics	Source
C10	Independent from government	Brown; Thériault; CNLAMCA; EMES; MPEN Moulaert and Ailenei; Vaillaincourt; Walker
C11	Ownership/ 50% + 1 - aboriginal ownership of co-op/Socially owned/collectively owned	Belhadji; Brown; Cato *et al*; CCEDNet; CNLAMCA; Côté; Quarter *et al*
C12	Breaks down silos between business and non-profits; neither private nor public	BCSER; Brock and Bulpitt; CCEDnet; Evans; Moulaert and Ailenei
C13	Quality of life/ enhance social, economic and environmental conditions of communities/collective well-being	ARUC-ES/RQRP-ES; Government of Canada; BCSER; Brown *et al*; HRSDC; Mendell; Salkie; Western Economic Diversification Canada
C14	Sustainable development	ARUC-ES/RQRP-ES; Bakopanos
C15	Community economic development/revitalisation of (urban) areas	Côté *et al*; Lévesque and Mendell; Loxley and Simpson
C16	Formal voluntary association of persons or collective bodies/ private, formally organised/freedom of membership	Bouchard *et al*; Chaves and Monzon; EQUALSET; Lévesque and Mendell; Monzon and Chaves; Neamtan; Vienney
C17	Democratic principles and values	ARUC-ES/RQRP-ES; Bouchard *et al*; Brock and Bulpitt; Brown; Cato *et al*; CNLAMCA; Co-op Secretariat; Enjolras; EQUALSET; EMES; Graefe; Hebb *et al*; MPEN; Mendell; Neamtan; Neamtan and Downing; Ninacs and Toye; Ryan; Social Development Canada; Vaillaincourt; Vienney; CWES
C18	Decision-making favours participatory processes	BCSER; Brown; Thériault; Co-op Secretariat; Defourney; EQUALSET; Neamtan; Ninacs and Toye; Ryan; Social Development Canada; Vaillaincourt
C19	One member-one vote	EMES; Monzon and Chaves; Vienney
C20	Run like businesses	Government of Canada; BCSER; CSCN&L; Davidson; Torjman
C21	Rooted in entrepreneurship	Bakopanos; Government of Canada; BCSER; CCEDNet; EQUALSET; HRSDC; Martin; Social Development Canada; Western Economic Diversification Canada
C22	Equal opportunities/equity	Bakopanos; CNLAMCA; EMES
C23	Inclusion/ meet the needs of disadvantaged people	Bakopanos; Brown; EQUALSET; Social Development Canada; Salkie; Western Economic Diversification Canada
C24	Rooted in independent community action/community based/locally based/citizen participation/citizen-civic engagement	Bakopanos; Brock and Bulpitt; Brown; Cato *et al*; CCEDNet; Côté *et al*; EU; Fontan; Graefe; HRSDC; MPEN; Quarter *et al*; Ryan; Social Development Canada; Salkie
C25	Civil society	Bakopanos
C26	Reciprocity	Brock and Bulpitt; Evans; Lévesque and Mendell
C27	Mutual self-help	Brown; Graefe
C28	Voluntary contribution e.g. of time and money	Brock and Bulpitt; Brown; Co-op Secretariat; EQUALSET; EU; Lévesque and Mendell; Ryan
C9	Paid workers	Co-op Secretariat
C30	Emphasis on job creation	Co-op Secretariat; EQUALSET; Graefe; HRSDC

Key dimensions and characteristics

Principle characteristic 1

We can see from Table 2, above, that the most cited characteristic of social economy organizations is the social and economic dimension mentioned earlier (28, or nearly 40% of sourced definitions for C1 and C2). The organizations that occupy the social economy are ones that put people before profit. That is they have both a social mission and the economic means of achieving that mission whether that be through paid or volunteer labour and, for most definitions, this means either a market- or non-market orientation or a market- and non-market orientation and involves the production of goods and services, which may be provided free at the point of delivery or may involve a cost or charge to the recipient (C1, C2). This is broader that C3, which emphasises a primary involvement in the market economy, which would by necessity exclude, for example, some non-profit voluntary and community organizations, co-operatives and infrastructure or development agencies (e.g. some third tier or apex membership organizations).

Most definitions emphasise the social goals and mission of a social economy organisation as a primary motivator. If we look towards social goals and outcomes then we can identify two secondary characteristics that support the key principle – C13 and C23.

1	Economic and social/ social mission/social mission with economic value/ non-market-market/people before profit
	Supported by C2 in the Table: Production of goods and services / carrying on economic activity
	Secondary characteristics supporting social mission include: C13: Contribution to and enhancement of social, economic and environmental conditions of communities; quality of life; and collective well-being C23: Inclusion and meeting the needs of disadvantaged people

Principle characteristic 2

The second characteristic – identified over a third of the sources - relates to internal decision-making processes and relationships with key stakeholders and links to democratic principles and values. This may or may not include one member-one vote, which is particularly important to most co-operatives (although there has been a shift a way from this in some instances to vote holding related to resource input) and is a usual format for many registered charities and those who hold formal election and voting processes. It is however recognised in the definitions that some non-profits and co-ops may provide services to non-members who may to a greater or lesser extent be involved in participatory decision-making or stakeholder involvement depending on the particular organization.

This characteristic also recognises the political nature of some organizations i.e. the outward focus of democratic principles and values in some instances and links to social mission / people before profit.

2	Democratic principles and values
Supported by C18 in the Table: Decision-making favours participatory processes	

Principle characteristic 3

So what kinds of social economy organizations combine both social and economic dimensions in the production of goods and services and democratic principles? This is where we are helped by the third most commonly defined characteristic (over 30% of sources) – the organizations themselves or sub-sectors of the social economy.

These are identified as C6 in Table 2 and those most often cited are shown in bold, namely: voluntary organizations; registered charities; co-operatives; credit unions; mutual insurers; mutual societies; community economic development corporations[7]; associations; social enterprises; foundations; community enterprises; and some profit-making firms/business enterprises (see earlier discussion on problematic nature of this final inclusion).

Within many of the categories above there are sub-categories – for example, 'voluntary organizations' covers a broad base of volunteer groups, self help groups, advocacy groups, voluntary and community organizations and there are associated debates about inclusion and exclusion of certain organizations (e.g. schools, churches, trades' unions, political parties, universities, hospitals) in accounting for voluntary sector activities.[8]

Similarly, 'co-operatives' includes large production, retail and financial co-ops (as identified in Table 1), consumer co-ops, stakeholder co-ops, worker co-ops. This inclusive principle characteristic or descriptor would include co-ops that are entirely involved in market activity and where benefit of co-operative organisation may be for a closed membership rather than the community at large. This definition would also include intermediary labour market organizations and social firms (the latter sometimes confused with and seen as being synonymous to social enterprise) and incorporated as well as unincorporated bodies.

[7] Presumably independent corporations, rather than quangos - quasi non-government organizations – that is organizations set up and wholly funded by government but running independently or at arms length from government

[8] See for example Kendall and Almond (1999) for discussion of broad and narrow voluntary sector borne out of the work of the Comparative Nonprofit Sector Project

3	• Voluntary organizations • Registered charities • Co-operatives • Credit unions • Mutual insurers • Mutual societies • Community economic development corporations • Associations • Social enterprises • Foundations • Community enterprise • Some profit-making firms/for-profit enterprises/business enterprises

Principle characteristic 4

The fourth key characteristic (identified in 28% of sources) is the position or sense of place in the broader relationship between public and private sectors and is significant in relation to power and influence and organization identity and ownership: this is the independence and autonomy of the social economy as distinct from government, and the organizations within the social economy as autonomous and self-governed. Independence and autonomy is C9 in Table 2 and is supported by C10 (independence from government) and to some extent by C12 (breaks down the silos between business and non-profits/neither public nor private) and C11, ownership.

Concepts of ownership may relate to democratic principles and processes and social mission as well as not being in the hands of a few shareholders or part of government machinery. However, few of the organizations identified above or in the list provided as part of the policy scan could be identified as being wholly socially or collectively owned.

There is a broader ownership issue in terms of being locally based and integral to local communities, which can also be considered here. This also ties in somewhat to the first part of this characteristic, which refers to Aboriginal co-operatives and was also mentioned in more general contexts by other commentators in relation to community ownership. Here, the definition was more oriented to whether an organization could be considered 'aboriginal' (hence the 50% plus 1 ownership share) rather than a co-operative. It begs the question whether organizations set up and run by marginalised individuals and communities are automatically seen as part of the social economy and this would turn on the legal status of ownership and organisational form. For example, in this situation a co-operative would conform to legal and regulatory requirements of a co-operative enterprise and by definition would be part of the social economy. Similarly a social firm employing people with physical disabilities, mental health issues or learning and development issues and who participate in the running and organising of that form as appropriate, would be part of the social economy.

'Breaking down the silos between business and non-profits' links to social and economic dimensions of social economy organizations and to developing organizational forms, including new, hybrid organizations that blend charitable aims and objectives with economic activity such as trading; and fair-trade organizations. A secondary characteristic that links to the form or organisation of the social economy entity emphasises formality of organisation and membership.

4	Independence/autonomy/self-governed/self-organisation
	Supported by C10, C11 and C12 in the Table: • Independent from government • Ownership • Neither private nor public
	Secondary characteristics supporting organization include: C16: Formal voluntary association of persons or collective bodies; private and formally organized/ freedom of membership

Principle characteristic 5

The fifth characteristic is tied to elements of democratic and values-led organizations and complements the discussion on market and non-market orientation and ownership benefits. This is C8 in Table 2, and relates to income or surpluses generated by organizations and profit distribution. Social economy organizations ideally and typically are non- or limited-profit distributing and redistribute profits/surpluses for the benefit of organisational goals (social mission) so in this sense, social economy organizations are not set up for personal profit (in the sense of financial wealth creation – C7). This would act as a qualifier to exclude some for-profit organizations identified above. However, it also recognises that some social economy organisation do and will distribute some financial benefits to members (bonus schemes in some instances; dividends; limited distribution of end of year profits). These key and supporting characteristics were identified in 24% of the sources.

5	Non-profit distributing and redirection of surpluses in pursuit of social and environmental goals with rules prohibiting or limiting distribution of surpluses amongst members
	Supported by C7 in the Table: Not for personal profit

Principle characteristic 6

The final characteristic identified as a primary focus of social economy organizations is again related to place, mission, values, and to democratic or participatory processes. This is C24 – and describes a link to social movements, community action and citizen engagement associated with aspects of social capital (reciprocity – C26), civil society (C23) and mutual self help (C27). These characteristics were identified by 23% of the sources. A secondary characteristic linking to reciprocity and engagement is the concept of voluntarism (which relates specifically to volunteers and community input).

6	Rooted in independent community action/community based/locally based/citizen participation/citizen-civic engagement
Supported by C 25, C26 and C27 in the Table: Civil Society - Reciprocity - Mutual self-help	
Secondary characteristics supporting action and input: C28: Voluntary contributions e.g. of time and money	

Other characteristics to note

A secondary characteristic noted in 9 of the sources was that the social economy is entrepreneurial. While not fitting neatly into any of the above key principles, it supports the character, form and trajectory of the social economy and links specifically to problem identification and solutions as well as social and community enterprise.

One characteristic mentioned only by two sources, but which may become significantly more important, is linked to sustainable development. There is more pressure for organizations to become more self-sufficient and less grant dependent in the voluntary and community sector; we are looking more and more to sustainable business practices linked to climate change and environmental concerns; interventions in community social and economic development will also be more outcomes focused and look towards realistic change in terms of continued and sustained activity in localities and regions (sustainable communities). This is perhaps an area where the language of practitioners has not fully transferred to theoretical concepts and definitions we find in the literature.

Finally, a small number of definitions included the point that social economy organizations are peopled by paid workers and that the social economy has an emphasis on job creation (C29 and C30). While these do not correspond with the key principles outlined above, they are significant since they are used by two key government departments in Canada: the Co-op Secretariat and Human Resource Social Development Canada albeit in 2004 and 2005 respectively. Moreover, these sources are used by others in framing discussions and understandings of the social economy.

Boundaries and principles of the social economy: summary or conclusion?

The breadth and scope of the social economy will be discussed more fully in a working paper prepared as part of the research, but there are some key characteristics that we can look to in order to shape our understanding of social economy organizations in Atlantic Canada. Looking at the main principles above, we have not really been able to fully define the social economy per se although we can provide some common denominators with regard to the types of organizations that inhabit the social economy. Even then, we have to be flexible in our approach to some of the definitions and criteria in order to be inclusive of organizations in practice. From the criteria and discussion above we might suggest that...

The social economy is an a conceptual space that helps to bridge the distance between informal and formal organizations and between non-profits and business enterprise and which focuses on areas of social and economic well-being of individuals, communities and regions.

The social economy operates within (and sometimes apart from) broader economic and social systems that are governed, controlled, influenced and historically dominated by a two sector system of public (government – social sphere) and private sector (economic sphere) actors. Some commentators might refer to this broader system as neoliberal and/or capitalist society and economy.

The social economy is a 'bottom-up' concept co-constructed by the actors who make up or take up space in the social economy in their localities. Place, community and participatory democracy can be seen to be important cornerstones for engaged social and economic activity. This can be seen in a range of activities and community-based actions undertaken by social economy actors: caring for community members and environment, creation of new projects to meet social need, providing equitable and accessible employment and leisure activities, community ownership and control of local amenities and services, campaigns to protect habitats and endangered species, celebration and revitalisation of communities and cultures.

The social economy is an umbrella term for a number of individuals, groups, organizations, and sectors (e.g. voluntary and community sector, co-operative sector) that is broader and more inclusive than the 'third sector', includes 'community economic development' and contributes to a vibrant civil society.

Constituent organizations of the social economy demonstrate a number of principle characteristics. A primary characteristic is social mission. This appears to be geared less towards transformative social change (the social economy as an alternative to neo-liberalism and capitalist ideology and systems) and more towards generative and incremental change (focus on social problems and solutions; well-being of specific groups). Social goals can be achieved through economic means. Thus, the social economy contains organizations that are both market and non-market focused (and those that are a mix of both) to provide a range of goods and

services most often, but not exclusively, geared towards disadvantaged or excluded individuals and groups. Organizations may also provide goods and services that are not readily available through traditional market or state sources. This may include the entrepreneurial development of new services for marginalised communities (as was the case with homeless people, and people with HIV/AIDS), or un-served needs/wants for goods and services (such as wholefoods, organic products and alternative health therapies), which may in the longer-term become mainstreamed in to public and private sector provision.

The organizations meeting these social and economic objectives are primarily non-profit distributing and profits or surpluses are used to development self-sustainability or new goods and services. Those that do distribute profits and dividends to members and/or employees have limits on the way they do this. They embody democratic values and participatory practices operating in the space between government and private sectors, but increasingly in partnership with same sector and cross-sector organizations.

The combination of primary social mission and the focus on non- or limited distribution of profit geared to the benefit of the whole organization and members offers a primary distinction between social economy organizations and those profit-making organizations whose focus is on building an economic and profitable entity first and with supplementary or secondary social benefit as an outcome of successful business enterprise. However, the development of hybrid organizations, social enterprises and the concept of 'doing good by making profit' plus the acceptance of some definitions of for-profit companies as part of the social economy means this needs to be further explored. This is further complicated by the changing legislation and regulation of social economy enterprises in different countries, which also suggests a changing and dynamic arena of activity where definition and boundaries need regularly to be reviewed and updated.

Much of what is presented in this paper represents an ideal type of organization that neatly fits into a dynamic concept. Whether we can turn the identified characteristics into measures to help categorise organizations and used these as 'qualification criteria' à la Bouchard *et al* (2006) is open to question and debate. Indeed whether the criteria identified here in theory, and needing verification in practice, can be used to support the idea of a national database and conformity to an ideal type and variable indicators, is also complicated by criteria that appears, at first review, to be weighted towards social enterprise rather than the whole spectrum of social economy organization. We can already observe that as we define the ideal and look to what's 'out there' in practice, we have to make exceptions to 'the rule' in order to be inclusive of all organizations, and the variations in their legal and organisation forms, activities, processes and primary aims, that identify or have been identified as contributing to the social economy.

In this sense, we haven't reached a conclusion in this paper as to the 'best' and all encompassing definition of the social economy. The 'social economy' is shaped by historical, cultural, economic political and legal elements. Rather than organizational conformity to specified

activity and criteria (measurement against inputs), if we see the social economy as contributing to a vibrant civil society as mentioned above with a number of diverse actors, then we might also want to recognise (and measure) the effectiveness and contribution of social economy organizations to, for example, increasing social capital in localities, and creating and developing sustainable communities. This will undoubtedly impact on definitions and characteristics of organizations currently recognised as social economy organizations and social economy enterprises. In the words of Kendall and Knapp (1995) when describing the UK voluntary and community sector – what we have is a 'loose and baggy monster'. Loose and baggy the concept of the social economy may be but we can still recognise it as a monster and this continues to provide a platform for further exploration and dialogue.

Some of the identified issues and suggestions made here will form part of a more detailed discussion in a companion working paper, *Mutual [Mis]Understandings: exploring the boundaries of social economy activity in Atlantic Canada.* In particular the space occupied by the social economy and the spectrum of organizations within and adjoining the social economy will be explored and classifications and typologies examined.

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Appendix 1: Definitions of 'social economy'

Source	Definition
Alliance de recherche universités-communautés en économie sociale (ARUC-ÉS) and Réseau Québécois de recherche partenariale en économie sociale (RQRP-ÉS)	L'expression *économie sociale* réfère à un mouvement plus que centenaire qui connaît un nouvel essor depuis les années 1980, tant au Canada et au Québec qu'ailleurs dans le monde. Comme son nom l'indique, ce mouvement poursuit des objectifs à la fois économiques et sociaux : économiques parce qu'il regroupe des entreprises et des organisations produisant des biens et des services et sociaux parce que la recherche de profits y est subordonnée à la promotion de valeurs telles que la démocratie, la solidarité, l'amélioration de la qualité de vie ou le développement durable.
Bakopanos, Eleni, Parliamentary Secretary to the Minister of HRSD Cited in Cooperatives Secretariat, Government of Canada, 2004	The concept is based on values of sustainable development, equal opportunity, the inclusion of disadvantaged people, and civil society. The social economy is rooted in entrepreneurship and independent community action
BC Social Economy Round Table Mapping Project working definition, 2008	As Government of Canada working definition, plus SE is more than social enterprise; SE activity helps to break down silos between business and nonprofits, and within the non-profit sector. There tends to be a cultural shift from seeing people as "clients" to seeing them as "workers/owner/contributing community members". Decision making favours participatory processes.
Belhadji (2001)	The report provides discussion on the definition of an 'Aboriginal co-op': here the focus is on the qualification of 'aboriginal' rather than co-op per se. It uses the Aboriginal Business Canada definition (theoretically, rather than practically – i.e. it couldn't apply the definition): 'An Aboriginal business as one that has 50%+1Aboriginal ownership. Since owners of a co-op are the members, this definition means 50%+1 Aboriginal members'. Other definitions exist (although considered weak): if the co-op serves an Aboriginal community, that co-op could be labelled an Aboriginal co-op, and If management is primarily of native origin, then the co-op could be termed Aboriginal.
Bouchard *et al*, 2006	[Organisations that occupy positions within the social economy can be identified by their activities and practices according to four criteria: carrying on economic activity; the existence of social rules prohibiting or limiting distribution of surpluses among members; the formal voluntary association of persons and or collective bodies; and finally the democratic governance process.
Brock and Bulpitt, 2007, pp 3-4	Social economy organizations are generally understood as those that are neither private nor public. (Quarter, 2000: 55; Tremblay *et al*, 2002: 21). However, there is no clear dividing line between the three sectors, as many social economy organizations receive government funding, sometimes in substantial amounts, or participate in the market economy (Foster and Meinhard, 2002: 32; Quarter, 2000: 55). [A] broad and inclusive definition of the social economy ... includes voluntary organizations, registered charities, incorporated non-profits, co-operatives, credit unions, mutual insurers, community economic development corporations, and unincorporated formal associations that pursue a wide range of social objectives (Quarter, 2000: 55; Quarter, 2000: 57). While this broad definition of the social economy encompasses a wide variety of organizations, they do share many, but not necessarily all, of the following attributes: • a social mission with economic value, giving primacy to social objectives (Quarter, 2001: 57; Tremblay *et al*, 2002: 22; Browne and Welch, 2002: 102); • no shareholders and instead surplus earnings are reinvested in the social objective(s) of the organization; • governing principles of democracy and reciprocity and are community-based, although some may be more hierarchical or formal in structure; • reliance to various extents on the voluntary contribution of time and money (Quarter, 2000: 57; Quarter, 2001: 63; Tremblay *et al*, 2002: 21; Browne and Welch, 2002: 102).
Brown 2008	Rooted in local communities and independent from government, Social Economy

Source	Definition
	organizations are democratic and/or participatory, pull together many types of resources in a socially owned entity, and prioritize social objectives and social values. While they may intend to make a profit, they do so in a context that sees profit as a means to meet social goals, not primarily as a means to create individual wealth. They may rely on volunteer labour as well as, or instead of, paid employees. The Social Economy is characterized by mutual self-help initiatives, and by initiatives to meet the needs of disadvantaged members of society
Brown, Hall and Thériault, 2006, p 2, 3 and 4	[T]he SE as the area of social and economic life where people engage in mutual self-help, working to realize social/community values through organizations that are designed to enhance collective well-being rather than individual gain... Social economy organizations have a clear social mission and the following ideal type features: goods and services for members and communities without being oriented primarily towards making a profit; management is independent of government, elements of democratic decision making by workers/users, priority of people over capital, emphasis on participation, empowerment, individual and collective responsibility. The legal form such organizations take tend to be co-operatives, non-profit associations, or mutuals. (Thériault, 2006). In such organizations, social capital is as important as material capital. The social economy ...[is] composed of charitable, nonprofit and voluntary organizations on one hand and on the other hand, of social enterprises taking the forms of co-operatives (including financial co-operatives like credit unions), and mutuals (Levesque and Mendell, 2004). This makes clear that the social economy has non-commercial (or nonmarket) and commercial (or market) sides.
Cato *et al* (2004)	Cato *et al* suggest that, 'Amongst those with a more interventionist bent, the social economy is frequently proposed as a solution to the problem of long-term economic depression in regional economies, particularly in response to the decline of a dominant industry' (p7). We suggest that the following dimensions help to distinguish the social economy from the dominant economic model under capitalism... although we offer our views of how they define the social economy this is merely as a stimulus to further discussion. • Ownership • Control • Values • Product • Source of finance For an enterprise to be identified as forming part of the social economy it must be locally based and owned with a significant proportion of its value owned by its own employees. Whether through substantial union involvement in decision-making or through electing their own representatives to the board, or through direct democracy of all members of a small cooperative business, employees in a social economy enterprise must have genuine power to influence management decisions. ...for an enterprise to be considered part of the social economy a significant degree of its value must be owned directly by its employees or by other members of the local community... this financial tie between a local community and its economic enterprises that represents the attraction of the social economy. Private-sector businesses can move to labour-markets with lower wages; public sector projects are vulnerable to changes of government or of European funding priorities; but social economy enterprises are embedded in their local economy because they are owned and financed by local people.
CCEDNet National Policy Council 2005	Building assets and enterprises collectively owned by communities to generate both social and economic benefits. This would include: social assets (housing, child care, etc.), social enterprises including cooperatives, equity and debt capital for community investment, social purpose businesses, community training and skills development, integrated social and economic planning, and capacity building and community empowerment. The social economy is being created by community organizations (cooperatives and non profits) and social enterprises that generate both social and economic benefits, bringing entrepreneurship and social goals together in new forms

Source	Definition
	of social innovation. The economy is normally divided into three sectors: private, public and social. The social economy is a continuum that goes from the one end of totally voluntary organizations to the other end where the economic activity (social enterprise) blurs the line with the private sector.
Chaves and Monzon, 2007	The set of private, formally-organised enterprises, with autonomy of decision and freedom of membership, created to meet their members' needs through the market by producing goods and providing services, insurance and finance, where decision-making and any distribution of profits or surpluses among the members are not directly linked to the capital or fees contributed by each member, each of whom has one vote. The Social Economy also includes private, formally-organised organisations with autonomy of decision and freedom of membership that produce non-market services for households and whose surpluses, if any, cannot be appropriated by the economic agents that create, control or finance them.
CNLAMCA (National Liaison Committee for Mutual, Co-operatives and Associative Activities, June 1980 From 2001 known as the Conseil des enterprises, employeurs et groupements de *l'économie social*	[T]he set of organizations that do not belong to the public sector, operate democratically with the members having equal rights and duties and practise a particular regime of ownership and distribution of profits, employing the surpluses to expand the organization and improve its services to its members and to society *Cited by Monzon 1987 and Chaves and Monzon 2007*
Community Services Council, Newfoundland and Labrador, 2008	A broad definition of "social economy" encompasses a large part of the non-profit and cooperative sector – voluntary organizations, community economic development groups and co-ops... "Social economy enterprises are run like businesses, producing goods and services for the market economy, but they manage their operations and redirect their surpluses in the pursuit of social and community goals." (Quotation from *Social Economy*. Human Resources and Social Development Canada. Government of Canada. 19 Sept. 2005. http://www.sdc.gc.ca/en/cs/comm/sd/social_economy.shtml
Cooperatives Secretariat, Government of Canada, 2004	• The social economy is made up of foundations, co-operatives, mutual societies and associations that pursue activities that are both social and economic in nature. • Social economy organizations pursue social objectives that are intended to meet the needs of members or a community. Any commercial activity on the part of a social economy organization is intended to serve social ends through the reinvestment of surpluses. • The social economy is characterized by a democratic organizational structure that is based on the participation of all members in decision making. • Social economy organizations rely significantly on paid work and emphasize job creation, but they are also supported by important volunteer resources, particularly in the delivery of services.
Côté, 2005	Building a social economy: • Building assets and enterprises collectively owned by communities to generate both social and economic benefits • Social Assets (housing, child care, etc.) • Social enterprises including cooperatives • Equity and debt capital for community investment • Social purpose businesses • Community training and skills development • Integrated social and economic planning • Capacity building and community empowerment
Côté *et al*, 2007 (p 4-5)	Community non-profit organizations and co-operatives are the engines of the social economy, creating economic and social outcomes for their communities. We refer to these organizations and the strategies they use in much of English Canada as "Community Economic Development," by which we mean integrated approaches

Source	Definition
	to creating social and economic opportunities through local action by people to reduce disadvantage and generate greater self sufficiency. Building a Social Economy: Building assets and enterprises collectively owned by communities to generate both social and economic benefits • Social Assets (housing, child care, cultural facilities) • Social and community enterprises including co-operatives • Equity and debt capital for community investment
Davidson, 2004 (Head of Social Economy Unity, Dept of Enterprise, trade & investment, Northern Ireland)	[Social economy organisations]... have a social, community or ethical purpose; and operate using a commercial business model; and have a legal form appropriate to a not-for-personal-profit status
Defourney, 2006	The concept of "social economy" goes back to the 19th century when various new types of organisations and enterprises were formed collectively by groups of people in response to problems they were facing due to deep transformations of the economic system: co-operative societies, friendly (mutual benefit) societies, and other forms of undertakings which aimed at organizing production, consumption, access to credit, access to health care and other services on a more equitable and democratic basis. In today terms, the social economy gathers enterprises of the co-operative movements, mutual benefit and insurance societies, foundations and all other types of non-profit organizations which all share some principles making them correspond to the "third sector" of modern economies. Indeed, social economy organisations differ from the private for-profit sector as their primary goal is to serve members' needs or a broader public interest instead of maximizing and distributing profits to shareholders or members. They are also clearly distinct from the public sector although non-profit organisations may receive public subsidies to fulfil their mission: they are self-governed private organisations with the rule "one member, one vote" in their general assembly.
Defourney & Develtere, (1999) Centre D'économie sociale, University de Liege	The social economy includes all economic activities conducted by enterprises, primarily co-operatives, associations and mutual benefit societies, whose ethics convey the following principles: 1. placing service to its members or to the community ahead of profit; 2. autonomous management; 3. a democratic decision-making process; 4. the primacy of people and work over capital in the distribution of revenues
Defourney *et al* 2000	[O]ne way to represent the third sector or social economy is to divide it into three major components: co-operatives, mutual aid organisations and non-profit organisations (essentially associations).
Desroche, 1983, pp 204-6, cited by Bouchard *et al* (2006, p3)	[T]he basic components of the social economy sector are: 1) the cooperative, 2) the mutual society, and 3) the association. In addition to these central components, there are four peripheral ones: the communal enterprise (bordering on the public sector); the community, or popular, enterprise (bordering on the community sector); the joint enterprise (bordering on the trade union sector), and the participative enterprise (bordering on the private sector).
Economic Development Canada 2005	Sector that produces goods and services within the context of the market economy, but whose aim is to redistribute surplus in support of social and community objectives.
Economic Development Agency of Canada for the Regions of Quebec Act	This Act established the Economic development Agency of Canada for the regions of Quebec. Although no direct definition as such is provided, under 'interpretation/definitions' section of the Act, is states that for the purposes of the Act "enterprise" includes "social economy enterprise"

Source	Definition
Enjolras, 1994, p 94 Cited in Fecher and Lévesque, 2008	[T]he social economy may be defined 'as a mechanism for compromise designed to manage the tensions among several forms of organization, and involving market, domestic, solidarity-based, administrative and democratic forms of organization'
European Employment Strategy and the Social Inclusion Process (EQUALSET) http://www.kezenfogva.hu/equalset	Any economic activity based on the partnership of people that share common interests, in democratic and participative bodies, in which personal work contributions, either voluntary or labour, are considered over capital. Social Economy favours job post creation and different forms of entrepreneurship and employment that can give and answer to the labour integration of people with special access difficulties.
European Research Network (EMES)	The concept of "social economy" goes back to the 19th century when various new types of organisations and enterprises were formed collectively by groups of people in response to problems they were facing due to deep transformations of the economic system: co-operative societies, friendly (mutual benefit) societies, and other forms of undertakings which aimed at organizing production, consumption, access to credit, access to health care and other services on a more equitable and democratic basis. In today terms, the social economy gathers enterprises of the co-operative movements, mutual benefit and insurance societies, foundations and all other types of non-profit organizations which all share some principles making them correspond to the "third sector" of modern economies. Indeed, social economy organisations differ from the private for-profit sector as their primary goal is to serve members' needs or a broader public interest instead of maximizing and distributing profits to shareholders or members. They are also clearly distinct from the public sector although non-profit organisations may receive public subsidies to fulfil their mission: they are self-governed private organisations with the rule "one member, one vote" in their general assembly.
European Standing Conference on Co-operatives, Mutual Societies, Associations and Foundations (CEP-CMAF) 2002 Cited in Monzon and Chaves 2008	Principles governing 'membership' of the SE: • The primacy of the individual and the social objective over capital • Voluntary and open membership • Democratic control by membership (does not concern foundations as they have no members) • The combination of the interests of members/users and/or the general interest • The defence and application of the principle of solidarity and responsibility • Autonomous management and independence from public authorities • Most of the surpluses are used in pursuit of sustainable development objectives, services of interest to members or the general interest. (Déclaration finale commune des organizations européennes de l'Économie Sociale, CEP-CMAF, 20 juin 2002.)
European Union Definition and Statement on the Importance of social economy enterprises**:**	The Social Economy is found in almost all economic sectors. Cooperatives are particularly prominent in certain fields, such as banking, crafts, agricultural production and retailing. Mutual societies are predominantly active in the insurance and mortgage sectors, whilst associations and foundations figure strongly in the provision of health and welfare services, sports and recreation, culture, environmental regeneration, humanitarian rights, development aid, consumer rights, education, training and research. Some Social Economy bodies work in competitive markets while others work close to the public sector. The Social Economy is important because it: • ***contributes*** to efficient competition in the markets • ***offers*** the potential for job creation and new forms of entrepreneurship and employment • ***is largely founded*** on membership-based activities • ***meets*** new needs

Source	Definition
	• ***favours*** citizen participation and voluntary work • ***enhances*** solidarity and cohesion • ***contributes*** to the integration of the economies of the candidate countries.
Evans, 2001	Social Economy: that that sector of economic activity which is made up of social enterprises (local and other) organised around - • shared values about the satisfaction of needs, not for profit principles, co-operation and self-organisation. • distinctive types of inter-organisational relationships • pursuit of a new mode of production • a mode of economic integration characterised by norms of reciprocity • which make it both a formalised sub-sector of the broader third sector and distinct from the public and private sector.
Favreau (2006) cited in Brouard and Larivet, 2009	Typology of three families of social economy organizations, such as associations, co-operatives and mutuals.
Fontan, 2006	The social economy is made up of social organizations or collective enterprises that are up and running or are emerging in the sectors of co-operatives, mutual benefit societies, and associations. The social economy differs from the private economy in that it is based on citizen engagement.
Government of Canada Working Definition (cited by BCSER, 2008)	The social economy is an entrepreneurial, not-for-profit sector that seeks to enhance the social, economic and environmental conditions of communities. Social economy enterprises are a component of the social economy that are run like businesses, producing goods and services for the market economy, but manage their operations and redirect their surpluses in pursuit of social and environmental goals. (Pg. 1)
Graefe, 2005 Graefe, 2006	9-10 Ash Amin *et al.*'s (1999, 2003) view of the social economy as 'centred around the provision of social and welfare services by the not-for-profit sector.' It follows that 'social economy organizations are understood to represent a break from the 'binary choices' of conventional socioeconomic strategies that present market and state as mutually exclusive spheres of economic growth and regeneration'. 10 The social economy is presented as a holistic solution to these problems: it encourages collective self-help and capacity building through socially useful production; it enhances democracy and participation through the decentralization of policy to local communities and through the joint construction of supply and demand between users and providers; and it creates employment by responding to unmet needs
Hebb, Wortsman, Mendell, Neamtan, & Rouzier, 2006	Social economy enterprises (SEEs) are organizations democratically governed by their members or the stakeholders they serve that use a combination of market and non- market resources to produce and deliver goods and services to the marketplace. (PRI, 2005)
Human Resources and Social Development Canada Policy Development Unit, 2005 (p 7-8)	The social economy consists of a range of community-based organizations (e.g., cooperatives, non-profits, social enterprises, and community economic development organizations) that draw upon the best practices of both the voluntary and for-profit sectors to provide innovative and entrepreneurial solutions to individual and community problems. Not primarily motivated by the goal of maximizing profits, social economy organizations reinvest their surpluses to improve the quality and availability of the goods and services they provide to their communities. Often they are able to mobilize local resources to meet needs in ways that government and private business cannot. With their innovative business methods and their strong local roots, social economy organizations have a unique capacity to devise customized, place-based solutions to individual and community

Source	Definition
	problems. Typically, social economy organizations are involved in a wide range of social/economic activities that include such things as job creation, workforce integration, job training, the provision of community services (e.g. child care, housing, recycling, etc.), neighbourhood improvement and many other endeavours that improve the quality of life.
Karaphillis *et al*, 2009	The social economy is often spoken of as filling a void; it addresses the needs and demands not met by traditional organizations in the public and private sector (Bank of England, 2003; Bouchard *et al*, 2006; Carleton CCI, 2006; Kay, 2005; New Brunswick, 2008; Quarter *et al*, 2003; Teague, 2007). It developed as a response to the social issues created by the mainstream economy and the limitations of the state to address inequalities through traditional public sector organizations. The Social Economy emerged in a movement toward the creation of an alternative economy built on social beliefs and goals inadequately addressed by traditional economic entities. Social Economy Organizations range in focus on a continuum from social to enterprise. Where an organization falls on the continuum will determine to what extent it can be considered an SEO. Therefore, an SEO could be a registered charity, non-profit, private enterprise with certain re-distributional socio-legal arrangements, or a social enterprise.
Kay (2006, p 168)	Essentially, the social economy is made up of social enterprises and voluntary organizations that are actively trading
Lévesque and Mendell (2004, 4)	[T]he new social economy includes new personal 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 urban areas in decline or abandoned (Fontan, Klein and Lévesque, 2003). We refer to market-based and non-market-based activities to show that whatever their legal status, all 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; (c) and market resources from the sale of products or from the coverage of members of part of the costs of the goods and services concerned...[b]ecause 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).
Loxley and Simpson (2007, p 5 and 6)	Uses Mackinnon, 2006 p 26: "the objectives of the actors in the Quebec social economy and English Canada's CED community are much the same" and CCEDNet's 2007 definition of community economic development and compares to Neamtam's definition of the social economy: The Canadian Community Economic Development Network's (CCEDNet) definition of CED as "action by people locally to create economic opportunities on a sustainable and inclusive basis, particularly with those who are most disadvantaged. CED is a community based and community directed process that explicitly combines social and economic development and fosters the economic, social, ecological and cultural well-being of communities" (CCEDNet 2007). Nancy Neamtan (2005, 71) defines the social economy as "all forms of organization or enterprises involved in the production of goods and services (i.e., having an economic activity) that are not private, for profit or public." She emphasizes service rather than mere profit, independence from the state, democratic decision taking and people over capital when it comes to distributing surplus.

Source	Definition
Manchester Progressive Enterprise Network, UK (MPEN)	It is generally accepted to cover the range of organisations which are neither part of the public or private for-profit sectors. It is a "middle way" or "Third Sector" relying often on innovative partnerships and creative management techniques to enable social economy organisations to operate within a wide range of state legislative and fiscal structures. When compared to the mainstream economy organisations within the social economy will be more likely to : • be concerned with factors such as social solidarity, democracy or the primacy of the individual or small group rather than the pursuit of profit per se • have a close relationship with their local communities • be the result of public / private partnerships • not to see the market as their sole source of income with organisations securing public subsidies, donations or loans - they often have very mixed income to focus their attention on disadvantaged people; • have a small scale structure often with larger numbers of non-active associates or unpaid volunteers • take their responsibilities to the environment, local communities and social justice seriously. Such concerns can often be the primary reason for the existence of organisations in the social economy
Paul Martin, PM's Throne Speech, February 3 2004	[T]he efforts of a million Canadians working in the voluntary sector... and the efforts of the people who are applying entrepreneurial creativity - not for profit, but rather to pursue social and environmental goals."
Mendell, 2003	The *Chantier de l'économie sociale* in Quebec has retained the definition of the social economy that was proposed by the *Conseil Wallon de l'économie sociale* (CWÉS, 1990), inspired by the Belgian economist Jacques Defourny (1991). It is a two-part definition: the first part addresses the notion of the economy; the second addresses principles and values. First, the economy is defined from a substantive point of view (as Polanyi suggests - provisioning) instead of from a formal perspective (arbitration between limited resources and unlimited needs, as is usually proposed by economists). The social dimension of economic activity brings about the notion of social profitability, which implies the improvement of the standard of living and of the well-being of the population, a greater focus on public services and social benefits, the creation of jobs for those who would otherwise suffer from social exclusion, etc. Economic activity can be considered as part of the social economy to the extent that it follows certain principles: 1) the purpose of an initiative must be of service to members or to the community; 2) management must be autonomous; 3) the decision-making process must be democratic; 4) the redistribution of revenue and surplus must prioritize people and work; 5) individuals and the community must participate and take on responsibility. This definition is quite large, as it allows for the inclusion of all cooperatives, mutual benefit societies, associations and even some profit-making firms, that follow these principles (for example, with shareholders' agreements). This definition undeniably allows for a confrontation between values and principles and the capacity to put them into practice.
Mendell and Neamtan	The cooperative movement has a long and established presence and has contributed to the well-being and economic growth of Quebec. Numerous associations and non-profit organizations have played a vital role in meeting socioeconomic needs over the years. In Quebec, these collective enterprises, whatever their juridical status, are recognized as economic actors alongside the private and public sectors. What distinguishes the social economy in Quebec, however, is its broad reach that extends beyond these collective enterprises to include social movements and territorial intermediaries that identify themselves as part of the social economy.
Monzon & Chaves, 2008	The set of private, formally-organized enterprises, with autonomy of decision and freedom of membership, created to meet their members' needs through the market by producing goods and providing services, insurance and finance, where decision-

Source	Definition
	making and any distribution of profits or surpluses among the members are not directly linked to the capital or fees contributed by each member, each of whom has one vote. The Social Economy also includes private, formally-organized organizations with autonomy of decision and freedom of membership that produce non-market services for households and whose surpluses, if any, cannot be appropriated by the economic agents that create, control or finance them.
Moulaert and Ailenei (2005, p 2042)	Generally speaking, the term social economy designates the universe of practices and forms of mobilising economic resources towards the satisfaction of human needs that belong neither to for-profit enterprises, nor to the institutions of the state in the narrow sense... Essentially, the social economy is made up of the voluntary, non-profit and co-operative sectors that are formally independent of the state. Their market activities are means of achieving social development goals that transcend the market per se. Thus defined, the social economy should be logically considered as a third sector. It seems that social economy develops as a permanent stream of inventions of various social mechanisms, mixing market exchange, state intervention, collective civil sector organisation based on social movements driven by solidarity and reciprocity. The concomitance of the development of social economy and socioeconomic crises can be interpreted in these terms. (p 2049) The analytical work on defining the social economy and its governance as required by today's unmet economic, social and political needs, has not progressed very significantly yet. The social economy is presented as a family of hybrids between market, state and civil society; but this traditional social science 'classificatory' approach does not lead to an operational definition of the social economy. A proper analysis of the features of each of these 'allocation systems' must be left to empirical analysis that shows the immense diversity of social economy patterns. A definition of the term must account for the many forms of social relations that exist and their embeddedness in specific social, cultural, historical and institutional backgrounds. (p. 2050)
Moulaert and Nussbaumer (2005) (favour a more holistic definition, which is descriptive of the characteristics, motivations and actions of the sector rather than the concrete definition offered as an 'essentialist' definition	The social economy is considered as part of social innovation at the local level...(resting) on two pillars: institutional innovation (innovation in social relations, innovations in governance including empowerment dynamics) and innovation in the sense of the social economy—i.e. satisfaction of various needs in local communities... Yet both pillars are intimately related. Essentialist definition (p 2079) the social economy is that part of the economy (or the complement to the 'co-existing' other economy) that: organises economic functions primarily according to principles of democratic co-operation and reciprocity . . .;guaranteeing a high level of equality and distribution, and organising redistribution when needed . . .; in order to satisfy human basic needs, in a sustainable way. Sustainability refers to ecological, social justice and governance logics.
Neamtan, 2002	Today, the social economy in Quebec refers to an ensemble of cooperatives, mutual benefit societies and associations, ranging from the Desjardins credit union movement, to other, diverse community organisations. The social economy refers to all initiatives that are not a part of the public economy, nor the traditional private sector. In essence, it is characterized by enterprises and organisations which are autonomous and private in nature, but where capital and the means of production are collective. (p 2-3) The social economy, which is promoted by the Chantier de l'économie sociale, is part of a double-sided social movement. It is a movement of social transformation, aiming for the democratisation and development of an economy of solidarity; a movement which is able to evolve without confusing political goals with ideas concerning economic development. At the same time, the social economy is a movement of strategy and of action, aimed and deployed into the heart of a mixed economy that combines the activities of the market, the State and civil society.(p4)

Source	Definition
Neamtan, 2003 (Chantier de L'économie sociale, 1996 as cited by Vaillancourt *et al*, 2003)	...the social economy is an ensemble of activities that share five principles and structural elements. Social economy enterprises • aim to serve their members or the community as a whole, instead of striving for financial profit alone • are neither private business not public agencies • establish a democratic decision-making process that involves the participation of users and workers • give priority to people and work rather than capital in the distribution of revenue and surplus • are based on principles of participation, empowerment and individual and collective responsibility
Neamtan, 2005	The social economy is a pragmatic response to the economic and social challenges of globalization. It contributes to the renewal of positive and active citizenship locally, nationally and internationally, and to the process of redefining relations between the state, the market and civil society. The term "social economy" refers to all forms of organizations or enterprises involved in the production of goods or services (i.e., having an economic activity) that are not private, for profit or public. This definition therefore includes some very old organizations, such as some credit unions, agricultural co-operatives, and the network of YMCAs. It also includes very new initiatives such as the many nonprofit recycling businesses that are springing up across Canada, parent-run day care centres, worker- and consumer-owned cooperatives, social enterprises offering jobs to the marginalized, community radio, community-based social tourism projects, cooperative and non-profit housing, and thousands of other initiatives
Neamtan and Downing, 2005	Refers to the set of activities and organizations stemming from collective entrepreneurship, organized around the following principles: 1) The purpose of a social economy is to serve its members or the community rather than to simply make profits 2) It operates at arm's length from the state 3) It promotes a democratic management process involving all users and/or workers through its statutes and the way it does business 4) It defends the primacy of individuals and work over capital in the distribution of its surpluses and revenues 5) It bases its activities on the principles of participation and individual and collective empowerment (Pg. 17)
Ninacs and Toye, 2002 Le Chantier de l'économie sociale	These are association-based economic initiatives founded on the values of solidarity, autonomy and citizenship, embodied in the following principles: a. a primary goal of service to members or the community rather than accumulating profit; b. autonomous management, as distinguished from public programs; c. democratic decision-making process; d. primacy of people and work over capital and redistribution of profit; and e. operations based on the principles of participation, empowerment, and individual and collective accountability.
Painter, 2006 cited in Brouard and Larivet, 2009	The social economy "is a fairly new label for a diverse and evolving combination of nongovernmental organizations (NGOs) that have been producing and delivering goods and services in communities across Canada and around the world for well over a century" (Painter, 2006, p.30).
PRI , 2005	Organizations that aim to maximize their profits and are governed directly or indirectly by shareholders are defined as for-profit businesses. In contrast, SEEs involve a diverse collection of stakeholders in decisions and reinvest any profits to advance the mission of the organization, instead of disbursing them to owners/shareholders. The missions of SEEs are based on a combination of common interest and public service objectives.

Source	Definition
	Encompasses a collection of NGOs that do not aim to maximize profits, but instead to advance various common interest and public service objectives. (Pg. 1)
Quarter, Mook, & Richmond, 2003	Social organizations generally can be grouped within three categories: public-sector nonprofits, market-based social organizations, and civil society organizations... In general, all the organizations that make up the social economy are self-governing, and have at least some formal structure, whether or not they have been formally incorporated. That is, they have been duly constituted as institutions and do not depend wholly on the participation or goodwill of particular individuals. They are also characterized by social objectives, social ownership, volunteer or social participation, and civic engagement.
Restakis, 2006, p12	Social economy organizations are those organizations whose members are animated by the principle of reciprocity for the pursuit of mutual economic or social goals, often through the social control of capital. This definition would include all co-operatives and credit unions, non-profits and volunteer organizations, charities and foundations, service associations, community enterprises, and social enterprises that use market mechanisms to pursue explicit social objectives. For-profit enterprises would be included if surpluses are mutually shared by members in a collectively owned structure as in co-operatives or collectives. What would not be included are state institutions or programs and conventional capitalist firms such as sole proprietorships, partnerships, and investor-owned or publicly traded companies.
Ryan, S (2007) PhD Candidate in the Department of Adult Education and Community Development at the Ontario Institute for Studies in Education of the University of Toronto and SSHRC Research Fellow (ad found on web to recruit participants for research study)	Social economy enterprises are ones that have a strong social mission are member or public oriented depend in varying degrees on voluntary participation and support member engagement in democratic decision making. This study is searching for organizations or voluntary associations that subscribe to most of the above criteria and that also carry out a majority of their work online This study is interested in organizations that communicate organize provide goods or services fundraise advocate etc primarily using information and communication technologies Although many of these organizations engage in some face-to-face activity and may have geographic addresses their defining characteristic is that they rely on internet-based technology to achieve organizational objectives
Smallbone, Evans, Ekanem and Butters (2001), cited in Brouard and Larivet, 2009	the social economy is essentially a collection of social enterprises
Social Development Canada, 2004	A grass-roots entrepreneurial, not-for-profit sector, based on democratic values that seeks to enhance the social, economic, and environmental conditions of communities, often with a focus on their disadvantaged members
Social Economy Agency (Northern Ireland) cited by McManus, 2004	The term social economy defines a broad range of activities and practices which provide opportunities for local people and communities to engage in local economic regeneration and job creation. Through engagement in local economic activity people will as a consequence, identify and meet their own social and community needs as well. The Social Economy signifies: -Economic activity and job creation -Local ownership and empowerment -Combined financial and social dividends
Salkie, 2005 Western Economic diversification Canada	The social economy is a grassroots, entrepreneurial sector based on democratic values that seek to enhance the social, economic and environmental conditions of communities, often with a focus on their disadvantaged members. Common objectives include: reducing poverty, providing affordable housing, and addressing environmental concerns through social, cultural, educational, employment and lifestyle activities. Social economy organizations may be co-operatives, foundations, credit unions, non-

Source	Definition
	profit organizations, charities and social enterprises. They are not part of the private sector or government, but form a third sector. A social economy enterprise operates like a business, produces goods and services for the market, but manages its operations and redirects its surpluses in pursuit of social and environmental goals.
Torjman, 2008	[The social economy] - a 'unique and burgeoning sector of the economy in which business enterprises and economic activity seek not only to generate revenue but also to advance social goals'.
Tremblay, 2009	*Social Economy* (SE) – also known as the non-profit or third sector
Vaillaincourt, 2006	Each definition [of the social economy] is a construction influenced by the theoretical or practical objectives pursued. SE organizations produce goods & services with a clear social mission and have these *ideal type* features: Services to members and communities & non-profit orientation • Management is independent of government • Democratic decision-making by workers/users/local communities • People have priority over capital • Participation, empowerment, individual & collective responsibility are emphasized Looks at areas of activities e.g. social services, housing, cultural activities etc
Vaillaincourt *et al* 2003	Whatever the terms used —*social economy*, non-profit sector, third sector, voluntary sector — the reality that they cover "is deeply rooted in the social, economic, political and cultural history of a society, the conditions in which it emerges and the role that it currently plays will necessarily vary from one province to another" (Vaillancourt and Tremblay, 2002: 164) (p 3_
Vienney (1982, 1994) cited by Fecher and Levesque (2008): a Vienney (1980, 1994) cited by Bouchard *et al* 2006: b	a. In Vienney's (1982, 1994) view, the social economy enterprise is defined as the combination of a group of individuals and an enterprise. It is based on an economic relationship (an enterprise) and a membership relationship (a grouping together of individuals) whose operationalization requires cooperative rules (with the required adaptations for non-profit organizations). Thus, the social economy may be analysed using three major dimensions: (i) more or less dominated actors, (ii) activities that are necessary, but either have not been fulfilled or have been poorly fulfilled by the market or the State, and (iii) rules adapted to the needs of organizations combining the economic relationship with the membership relationship. b. Vienney's (1980; 1994) definition is based on the **rules of operation** which characterize the dual relationship of membership and of activity within cooperatives. These four rules are: 1) the rule regarding membership: democratic functioning (one member, one vote); 2) the rule linking members to the enterprise: members determine the enterprise's activity; 3) the rule linking the enterprise to its members: limited or prohibited the distribution of surpluses; 4) the rule regarding the enterprise: surpluses, which are collective property, are reinvested.
Walker, 2008	In the North we include traditional land-based activities, non profit organizations, co-operatives, voluntary organizations, unions and other groups whose primary purpose is not for profit or for the state
Walloon Social Economy Council (CWES) 1990	[T]he part of the economy that is made up of private organizations that share four characteristic features: 'a) the objective is to serve members or the community, not to make a profit; b) autonomous management; c) a democratic decision-making process; and d) the pre-eminence of individuals and labour over capital in the distribution of income'. (Conseil Wallon de l'Économie Sociale (1990): Rapport à l'Exécutif Régional Wallon sur le secteur de l'Économie Sociale, Liège.)

Source	Definition
Western Economic Diversification Canada 2005	An entrepreneurial, not for profit sector that seeks to enhance the social, economic and environmental conditions of communities. Separate from the private sector and government, the social economy includes co-operatives, foundations, credit unions, non-profit organizations, the voluntary sector, charities and social economy enterprises. They operate in sectors ranging from housing to communications and in areas such as recycling, home care, forestry cooperatives, restaurants, catering and manufacturing. Social economy enterprises are a component of the social economy that are run like businesses, producing goods and services for the market economy, but manage their operations and redirect their surpluses in pursuit of social and environmental goals. Common objectives for social economy organizations include alleviating poverty, providing affordable housing, improving employment and economic opportunities, addressing environmental concerns and providing access to services and programs that can assist individuals and groups to improve their personal circumstances.
Wikipedia	Social economy refers to a third sector in economies between the private sector and business or, the public sector and government. It includes organisations such as cooperatives, non-governmental organisations and charities
Wynne *et al* (2008)	Is made up of social enterprises and voluntary organizations that seek to meet social aims through economic and trading activities. (Pg. 1)
Yorkshire Forward (regional development agency in the UK – (http://www.yorkshire-forward.com/) cited by McManus, 2004	Social Economy Defines an area of activity existing between the private, market sector on the one hand and the public sector on the other. It includes notionally social enterprise organisations but also voluntary and community organisations, foundations, trade unions, religious bodies, housing associations, co-operatives and others

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SES/ESD Network Research Goals

- Contributing to the theory and practice of social economy in the Atlantic region
- Internal bridging, bonding, mentoring & capacity building
- Encouraging use of the "social economy" as a framing concept in the region
- Linking Atlantic partners with other parts of Canada and the world

SES/ESD Network Research Themes and Questions

Conceptualizing & describing the social economy in Atlantic Canada

- What does the social economy look like? What needs does it address?
- How can we best capture this sector conceptually?
- What, if anything, makes it distinctive or innovative? How interconnected are its facets,
- & to what effect?
- What are the characteristics of social economy organizations?
- What are the implications for government policy?

Policy inventory and analysis

- How are different understandings of "social economy" reflected in government policy?
- What needs are not being met, & what changes are needed in regulatory environment?
- What indicators can we develop to aid in policy development?

Community mobilization around issues of common concern (natural resources; food security; inclusion and empowerment)

- Do social economy organizations contribute to social inclusion, the democratization of the economy, & empowerment?
- What inputs are needed to overcome obstacles & build capacity?
- What can we learn from research on mobilization around food security, empowerment & inclusion, community management of natural resources & energy?

Measuring and Financing the Social Economy

- What can social accounting, co-operative accounting, social auditing, & other techniques contribute towards a better understanding of the work and contributions of social economy organizations?
- Where do social economy organizations obtain the financing that they need?
- What do social economy organizations contribute toward financing the social economy?

Modeling & researching innovative, traditional, & IT-based communication and dissemination processes

- How can social economy actors best communicate?
- What can our Network team members contribute by developing & modeling processes and techniques?
- What can be gained from exploring technology as an equalizer vs. technology as a barrier?

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