



## **4<sup>th</sup> CIRIEC International Research Conference on Social Economy**

*University of Antwerp, 24-26 October 2013*

***Social economy on the move ...***

***at the crossroads of structural change and regulation***

**CALL FOR PROPOSALS**

**Deadline - March 21, 2013**

SOCIAL  
ECONOMY  
*on the move...*

[www.ciriec-ua-conference.org](http://www.ciriec-ua-conference.org)

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*To provide a forum of scientific debate, CIRIEC initiated in 2007 a biennial conference in social economy research. Without excluding practitioners or public authorities' representatives, the conference addresses mainly scholars.*

*Three conferences already took place in Victoria (Canada) in October 2007, in Östersund (Sweden) in October 2009 and the third one in Valladolid (Spain) in April 2011; the latter around the theme: "The Social Economy, prop of a new model of sustainable economic development". Each time those conferences gathered 300-400 participants.*

*The 4th CIRIEC International Research Conference on Social Economy (4<sup>th</sup> ICOSE) aims at stimulating scientific discussion and participation at a global scale. It offers the opportunity in a multi-lingual environment to debate among various disciplines and to confront multi-levels analyses and methods in a wide-ranging and ambitious perspective. The current developments in social economy research must be made visible through solid analyses. Structural changes and possible regulatory answers to societal challenges induced by social economy and its diversity of actors are to be critically addressed.*

*The 4<sup>th</sup> CIRIEC International Research Conference on Social Economy will be organized by CIRIEC-Belgium with the close collaboration of the University of Antwerp, on its site on 24-26 October 2013. 10 themes are proposed to articulate the conference topic centred on structural change and new regulation. Plenary sessions and field visits will enrich the scientific discussions mainly organized in parallel working sessions.*

## **1. Introduction to the Conference topic 2013**

For some centuries, in the North as well in the South, social economy has unfolded in various forms. The institutions of the social economy (cooperatives, mutuals, nonprofit organizations, etc.) have experienced periods of growth and recession, of both success and failure, in the supporting, complementing and/or counteracting roles in relation to the dominant economic model in place. This 4<sup>th</sup> CIRIEC International Research Conference on the Social Economy aims in particular at **discussing the place of social economy in modern society and its current role when facing potentially heavy structural transformations and new regulatory frameworks**. Thanks to the more or less permanent dynamic features of this field in society, social economy initiatives and enterprises foster bottom up changes which in turn favour structural changes and in many cases are the agents of change in regulation. This includes for example regulation centred on non-market values, cooperative regulation, next to administrative and competitive regulation.

**Structural changes** are multi-facetted and depend on social, economic, financial, demographic, technological, environmental, etc. factors that all impact the sphere of social economy. This results

for instance in increased globalization and competition, in less public spending, in new financing schemes, in social innovations, etc. All those changes in turn influence on the one hand the behaviour of social economy enterprises and organizations, on the other hand the answers from public authorities. How do social economy actors adapt to structural changes, possibly induced by regulatory changes: Do they shape revised answers to societal needs and challenges, or propose other types of solutions? Do they develop other behaviours in terms of governance, or new production modes (e.g. inter-cooperation)? What new or better adapted products/services do they propose? Do they foster in turn new or re-regulation?

**Regulation** on its side – be it at regional, national, European, international level – takes various forms and is not restricted to its economic or legal sense. It can be of statistical, legal, administrative, institutional, fiscal, budgetary, accounting, public policy, social, environmental, etc. nature. But other, more fundamental structural changes in mentality, stimuli to democratic and philosophical debate, hybridization in governance approaches, joint participation of various types of stakeholders and actors – not forgetting the mobilization by civil society actors – might also bring about the needed adaptation or revisited regulatory conditions in order to better address societal issues. What type of new regulations are encountered: introducing mandatory impact assessments, separating real flow from financial flow, adapting rules on the labour market, or determining accessibility policies, others?

Looking at the development of mutuals, cooperatives and other social economy actors, a 'systemic' role of social economy in the design of policy may be noticed. It is this **reactive, circular movement** that the present CIRIEC Conference aims at putting to the fore, with a particular endeavour to connect research and thinking from many different academic disciplines for a **better understanding and knowledge of the social economy sector and its potential role in actively shaping the restructuring and re-regulation of contemporary society**. In terms of development model, structural changes and new regulations are not aims as such, but only tools for more or less shared objectives.

The 4<sup>th</sup> CIRIEC Research Conference on the Social Economy is thus **far-seeking** and wishes to **attract and discuss proposals to counter the idea that "There Is No Alternative"** – another society is indeed possible. Social economy, with its particular feature of territorial anchorage and community-based action, provides examples of satisfactory answers to the many current global challenges of exclusion, poverty, unemployment, inequality, planet endangering, just to mention a few. But numerous questions and issues need further scrutiny.

Despite being studied by scientists and observed by politicians, actors such as cooperatives, mutual societies and nonprofit and solidarity-based organizations are not yet properly recognized and acknowledged. Their economic weight, their worth and societal added value, their capacity of innovation and adapting to change, their ability of mobilizing social networks and human capital, their entrepreneurship spirit, their role in territorial development are some of the features proving the success and potential of such actors in society. But weaknesses and difficulties must also be faced with original solutions and tools to overcome them. Many of the actors in the social economy act and develop themselves within the existing economic model but sometimes they also strive to change or challenge it, aiming to bring along sustainable and ethical answers to the latest crises and their various impacts for citizens and enterprises throughout the world and its regions.

The **2013 CIRIEC Conference in Antwerp** particularly **looks for multi-disciplinary analyses and approaches, for conceptual and instrumental studies, for evaluations and critical assessments to deepen the global knowledge on the sector**. Contributions from scholarly disciplines such as history, sociology, political science, philosophy, law, economics, statistics, business administration, public administration, geography are invited. Alternative approaches provided by younger as well as senior researchers are welcome to show the possible answers to heavy structural transformations but also the necessary adaptations to the new regulatory frameworks. Theoretical, as well as descriptive approaches – at micro as well as macro level – are welcome.

## **2. 10 themes of the Conference**

The more general and broader perspective envisaged for the CIRIEC Conference, as sketched above, is dealt with in the 10 different and more distinct themes of the conference presented below.

These 10 themes are numbered from a more general meso-level up to a more micro one. They are also going from a more policy-oriented approach to the final users/beneficiaries, passing through the enterprise/organization level delivering the service/product.

- Theme 1: **Policy and ideology of social economy**
- Theme 2: **Measurement and assessment of the social economy**
- Theme 3: **Laws on social economy, legal statutes and types of undertaking**
- Theme 4: **Financing mechanisms, state aid and public policies**
- Theme 5: **Innovative management**
- Theme 6: **Governance models**
- Theme 7: **Network management, partnerships and stakeholders**
- Theme 8: **Globalization and local anchoring**
- Theme 9: **Social economy, social inclusion and fight against poverty**
- Theme 10: **Social innovations, products and services**

Those 10 themes are outlined further in the present document.

### 3. Proposal submission

CIRIEC and the University of Antwerp invite researchers and experts from universities, academic and research institutions worldwide to take part in the conference and submit proposals relevant to the thematic streams of the event.

Although proposals need to be submitted in English, oral presentations at the Conference can be made in English, French and Spanish. Simultaneous translation will be ensured during the CIRIEC Conference.

#### **When preparing your submission:**

1. Please consider first the central question/object of your contribution.
2. Second, choose 5 key words to best fit your paper.
3. Third, consider the following questions to characterise your contribution:
  - Is it general or specific?
  - Are your research questions considered at a rather meso, macro or micro-level?
  - Is your research of conceptual or methodological nature, policy oriented, or aimed at shaping regulation?
  - Or is it rather of technical kind, linked to the operational/implementation level and depending on the present structural changes or the existing regulation?
4. Fourth, prepare your proposal in English (6.000 - 9.000 characters).
5. Fifth, select one of the 10 themes. Each of the 10 theme outlines contains questions and open issues that will help you to choose the theme that best adapts to your proposal.

Themes are numbered from 1 to 10 going from the more general to the more specific. They are also numbered decreasingly from a more policy oriented approach, passing through the enterprise delivering a service/product in a given environment, towards the final users/beneficiaries. While it could be seen that the numbering goes from the rather meso, macro-level towards the more micro-level of the analysis, each theme can encompass several kinds of analyses and approaches.

**NOW fill in the form:** <http://ciriec-ua-conference.org/submission.php>

PLEASE NOTE THAT IF ACCEPTED, YOU WILL BE INVITED TO SUBMIT A FULL PAPER. PROPOSALS ALONE WILL NOT BE ACCEPTED FOR THE FINAL CONFERENCE.

#### 4. Languages

Paper proposals must be submitted in **EN**

Oral presentations at the Conference can be made in 3 languages: EN – FR – ES

Long versions of accepted papers (and posters) can be delivered in 3 languages: EN – FR – ES

#### 5. Selection process of the proposals

All proposals will be reviewed by members of the Scientific Committee of the Conference.

The selection criteria are:

- scientific relevance of the proposal
- methodological approach and/or key research question(s)
- relevance with respect to one of the 10 themes.

Some proposals, not retained as papers, may possibly be presented as electronic posters. An ad hoc space, and time, will then be dedicated in the program for a presentation/exchange with the authors.

**Only the papers for which one author at least is registered by September 1, 2013 (payment validated) will be included in the Conference programme.**

#### 6. Publications perspectives after the Conference

Five outlets for publications are already foreseen.

1. After the conference, papers presented will be published on the scientific website of the conference. Further a ISBN number will be attributed to an electronic version of the 4<sup>th</sup> ICOSE proceedings with those papers.
2. Some papers or plenary speeches will be subject to a selection process for an evaluation in view of a publication in international peer-reviewed scientific journals. CIRIEC's international journal, *Annals of Public and Cooperative Economics*, already foresees a special issue ([http://www.ciriec.ulg.ac.be/en/pages/5\\_3note\\_auteurs.htm](http://www.ciriec.ulg.ac.be/en/pages/5_3note_auteurs.htm))
3. The scientific reviews of CIRIEC National Sections also offer publications possibilities after the Conference in 2013-2015.
4. Two editors (Peter LANG & La Charte/Die Keure) have already expressed their interest in publishing special volumes of selected papers from the Conference (separate information will be made available later on).
5. The electronic collection of CIRIEC Working Papers is open to publish some papers presented at the Conference ([http://www.ciriec.ulg.ac.be/en/pages/6\\_2working\\_papers.htm](http://www.ciriec.ulg.ac.be/en/pages/6_2working_papers.htm)).

## 7. Deadlines

- For paper proposals: **March 21, 2013**
- Notification of accepted proposals: mid-May 2013
- For long version of selected papers: September 1, 2013

## 8. Description of the 10 themes of the Conference

### **Theme 1: Policy and ideology of social economy**

On the basis of different ideological value frameworks political policymakers choose different ways to shape the social economy policy and the political conceiving related to it. From this perspective, it is important to discuss the concept, the aims, the missions or the even purpose of social economy enterprises and organizations. At present 'market' is the prevailing value framework. This predominance translates into special institutional settings and market oriented structures. But there is also an increasing need to re-emphasize and reshape the “classic” general solidarity, the mutualist legacy and the principle of mutual assistance and support. Indeed, the underlying philosophy of social responsibility and ethical behaviour is essential if one wants to develop a genuine social economy. The current relation between social economy and market needs thus to be thoroughly discussed.

### **Theme 2: Measurement and assessment of the social economy**

Organizations need to be accountable to their members, funders and other stakeholders. Numbers are required by policy makers to justify state support, but also to show size, scope, performance and outcomes. Measuring and evaluating social economy is a multifaceted process in reason of its very nature, which is multiform (composed of nonprofit, cooperative, mutual benefit organizations and enterprises, etc.), permeable with other sectors (with emerging hybrid forms of organizations) and complex (combining social missions with economic activities). Different methods have each their own utility:

- satellite accounts and national statistical observatories;
- impact assessment (social, economic, environmental);
- longitudinal and/or demographic surveys;
- program evaluation;
- etc.

Issues can be raised about how to embrace the field as a whole:

- qualification and classification of social economy entities and activities;
- indicators that measure the weight and the impacts;
- development of methodologies to account for the evolution of the field;
- etc.

But other aspects also need to be discussed on how to value the performance of organizations and sectors:

- notion of performance;
- adequate measurement of social factors;
- participatory forms of assessment;
- etc.

International comparative empirical studies casting new light on the social economy are also highly welcome.

### **Theme 3: Laws on social economy, legal statutes and types of undertaking**

Specific social economy laws, new legal/institutional frames and rules as well as subsidies/tax benefits and other support policies to social economy were issued recently in various countries.

- What is their purpose?
- What is their effect?
- Do they reach their policy goal?

This legal oriented theme also aims at comparing the pros and cons of the different types of undertaking in the various countries and to subject all kinds of aspects linked to legal statutes and specific rules for social economy organizations (and their support bodies/philanthropists) to a critical examination. In many countries debates are going on about the desirability of specific statutes for the social profit sector and the social economy in particular. This debate also concerns European Statutes. Comparative law, fiscal issues, cross-border related problems, labelling, etc. should be addressed and exchange of experiences can be helpful in this respect.

### **Theme 4: Financing mechanisms, state aid and public policies**

Numerous public policies and regulatory devices support social economy enterprises and organizations to implement their activities; while in turn, social economy asks for more regulation and support.

Financing social economy is for instance essential to help unfolding social economy initiatives and ensure their durability. Numerous social economy organizations operate on a subsidised market where either the undertaking or the employees or the products and services (in part) receive government funding or indirect support.

- Should/can it stay like this?
- What are the moves under way?
- What solutions are developed and what results do they bring: mix of incomes for enterprises, partnerships, cooperation between various economic and institutional actors, micro-credit, complementary currencies/local exchange and trading schemes (LETS), fair trade arrangements;
- etc.?

Questions concerning unfair competition with the regular market or possible 'favouritism' through special clauses in public procurement need to be dealt with. Is regulation of social economy needed in this respect? Understanding problems with (international) rules on market regulation is also essential with a view to a correctly functioning social economy. Because of such issues and economic rules, correct demarcations between the profit sector, the public sector and the so-called third way are required.

### **Theme 5: Innovative management**

Given the changing environment (economic and financial crises, welfare state cuts, and enterprise rationalization) and the related changes in the institutional settings it is obvious that there is an

urgent need for innovation. This translates into structural adaptations in decision-making, management (and governance) processes, but also business process and product innovation. These issues are closely inter-related and give rise to changes in the institutional or governance framework or to other ways to 'shape', organize and manage social economy activities.

Suggested questions which papers might address include:

- What are the main drivers of innovative management?
- What role do ICT and Web 2.0 technology play?
- What innovative initiatives, management practices or new business models are emerging (e.g. social franchising, outsourcing of services, social clauses in public service contracts, etc.)?
- What evolutionary patterns can be observed in terms of scaling and growth of social economy enterprises/organizations?
- How do we critically assess such developments in terms of their pros and cons?
- Are there new best practices, and what are the preconditions for their development?

And with regard to the general impact of such developments within the sector:

- Does the social economy feature particular innovative specificities in relation to labour/training policies?
- Is there a distinctive 'quality' to social economy jobs?
- Regarding demographic and societal changes, what particular innovations do social economy organizations bring in relation to labour and human resources management (e.g. young people, seniors, women)?

And what contextual factors influence these developments in a positive and negative sense?

- Do systems of co-governance and social dialogue play key roles, and similarly, does the external regulatory framework play an essential role?
- Or on the other hand, does such innovative management impact policies and regulatory framework in this and other fields?

And in terms of broader societal challenges:

- Can we still argue that the social economy is able to build trust with existing human resources, while bringing additional available social capital into the organization?
- And is the social economy able to open up new channels in the light of the reforms of the social welfare state? Particularly with regard to helping to develop and exploit new forms of solidarity at all levels?

### **Theme 6: Governance models**

Government and other institutional actors set great store by 'good' corporate or organizational governance. This has led to structural changes, such as new regulations and the development of codes of practice, notably to improve effective democracy. This has been done, for example, by:

- advocating the clear division of roles and responsibilities between chairs and chief executives,
- setting out the responsibilities and decision making powers of governing bodies,
- and enhancing the powers of members or shareholders.

Within the social economy there are further considerations:

- To what extent should workers, members or other stakeholders be involved in organizational governance and how can the right people be recruited and developed (e.g. human capital)?

- Is there a particular feature proper to social economy organizations in terms of recruitment or salary policy (e.g. insertion of women, of young and/or senior persons, training)?
- How can governing bodies in particular give shape to the basic values of social economy and ensure the transmission of values and ideals to the next generations of managers?
- How do - if so noted - social economy actors (and/or stakeholders) influence regulatory measures linked to governance, for instance in public (or publicly participated) companies?

Further, the growth of social economy organizations and the development of the sector raise additional governance challenges. For example:

- What are the implications for the governance of social economy organizations when creating subsidiaries or when subcontracting?
- Can social economy organizations retain their values and principles as they grow?
- How can the social economy evolve from a small, locally embedded welfare logic to a market oriented logic?
- How are workers (and possibly the trade unions) involved in governance?
- Do social economy organizations require new legal structures and forms of regulation?

Finally, how can the numerous societal goals or impacts aimed at by social economy organizations, such as social and territorial cohesion, accessibility of services, urban and rural development, or sustainable development be addressed in the governance 'equation'?

### **Theme 7: Network management, partnerships and stakeholders**

The present institutional setting seems to indicate a growing attention for the involvement of stakeholders, albeit internal stakeholders (i.e. within the organization/enterprise, like employees) or external stakeholders (i.e. outside the organization/enterprise, like public institutions, not for profit/profit partners, beneficiaries, trade unions and citizens). Within not for profit organizations, this growing attention for stakeholders often leads to structural adaptations regarding decision-making processes and information sharing. Additionally, legal and juridical constructions are – need to be - developed to embed this decision-making and informational involvement. As such, stakeholders often become “full” partners of not for profit organizations. Finally the awareness, commitment and impact of these stakeholders on the general position and added value of not for profit organizations in our society are profoundly changing.

Related policy and research questions of this theme could be:

- What are alternative ways in which several types of stakeholders are or can structurally be involved in the decision making processes and/or information sharing of not for profit organizations?
- What are the pros and cons of these alternatives or how do they influence the organization?
- What are possible - experienced - best practices as well as conditions of “success”?
- What are associated and/or “needed” legal and juridical constructions?
- How can this regulation protect and/or guarantee the not for profit identity after admitting and involving stakeholders with different or other – conflicting – interests?
- Are different regulations necessary depending on the degree of political and economic democracy and on the level of economic development?
- Do different types of stakeholders constitute an identifiable “community” and how do these communities commit themselves to not for profit organizations?
- What is the added-value of involved stakeholders on the performance of not for profit organizations?

- What is the importance and the role/function of social capital in a multi-stakeholders approach of not for profit organizations?
- In this perspective, is education to citizenship and participation in the light of 'solidarity' essential for the success of such a stakeholder approach?

### **Theme 8: Globalization and local anchoring**

Considering the present context and the growth perspective in social economy organizations, a lot of attention is placed upon the field of tension between the global and the local focus areas. Although these translate into different structures and different institutional settings, it is obvious that they are not always opposites. Here too the adage goes: Think global, act local !! At all events, choices are necessary. Questions:

- How?
- Alternatives?
- Pros and cons?
- Best practices and preconditions?

On one hand:

- What about the territoriality and territorial turning point?
- What links with socio-political processes and participation?
- And what enrolment in public policy?

On another hand:

- How to characterize the socio-economic conditions necessary to territorialization : between complementarity, cooperation and competition?
- What are the organizational arrangements?
- What places for stakeholders and especially for workers, final users and financiers ?

Issues of territorial development, spatial anchoring of activities and employment, short economic circulation of goods, co-construction of social economy initiatives (with different levels of spatial action or involvement), developing local partnerships, linking people worldwide (including north/south cooperations), scaling up strategies (and their effects in terms of possible concentration, mutualisation or other) are only some examples of what can be addressed under this thematic.

While doing so, social economy seeks:

- to set up systemic constructions allowing for effective involvement and embedding into the local community,
- and also to construct new paths of economic development thinking articulations between local and global.

### **Theme 9: Social economy, social inclusion and fight against poverty**

Social economy is the driving force par excellence for the social integration of many of the target groups in society, not only on the labour market but also in society as a whole. Numerous initiatives show that activation and commitment make the fight against poverty and social exclusion far more successful than is the case if only benefits and social assistance are involved. Indeed, the involvement of actors, workers, stakeholders and beneficiaries in the 'enterprise' as such whatever the economic activity, product or service, can enhance its societal success with respect to social inclusion. That

way, social economy enterprises can play an important role in improving equal access to numerous services for all, thereby preventing and providing solutions to the ever increasing poverty problem in society. Accessibility needs of course to be addressed in a broad sense: mere existence of the service, geographical, financial, social access, capability of the users, etc.

### **Theme 10: Social innovations, products and services**

Social economy is a driver of social innovation, especially regarding societal and environmental challenges, and social cohesion. This appears usually with respect to sustainable development, but other features of social innovation are particularly driven by social economy organizations, too. This is for instance the case in relation to:

- quality of products and services (e.g. user-friendliness, hard-to-reach target-groups),
- quality of production/provision processes (e.g. involvement of users as a precondition for social innovation, labour conditions, outcome orientation),
- but also in relation to cultural diversity and multi-ethnic aspects, or more generally in social change.

Social services constitute a large field where these aspects did particularly develop in recent years in spite of or due to the changing regulatory context in Europe and beyond. Market-oriented governance, privatization and various rescaling processes have resulted in a multiplication of stakeholders and in a 'hybridization' of public, commercial and social economy providers. The challenges for the latter consist in re-shaping their proper identity, in finding ways to strengthen their specific role as initiators of social innovation (including regulation). Contributions to Theme 10 are therefore invited to focus on theory and/or practice evidencing the unique quality of social economy organizations in social innovation. This includes considerations of regulatory frameworks that could boost the strengths of social economy organizations in an emerging 'new public governance'.

## 9. Scientific Committee of the Conference

### Honorary members

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