

Three decades of research on social economy public policies. Further insights for government policies on cooperatives, nonprofit entities and social enterprises

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ABSTRACT: The aim of this article is to provide an overview of the scientific literature focused on the government policies fostering the social economy, including cooperatives and non-profit organizations, published in recent decades. For this analysis, a research matrix with heuristic capacity is used to capture the key dimensions that characterize these policies. The concept of social economy policy is addressed, along with the rationale behind the deployment of these policies and the main policy models that have been implemented. It investigates who the actors responsible for their activation and implementation are, what the main instruments of these policies are, what governance and management models they use, what organizational and institutional adaptation of social economy policies is required, how these policies should be evaluated, what factors contribute to the success or reduce the effectiveness of these social economy policies, and the continuity of these policies over time, in particular their political and financial sustainability. Finally, in light of the research already carried out, new lines of future research are proposed.

KEYWORDS: Social economy, Cooperatives, Third sector, Public policy, Promotion of cooperativism, Transformative social economy policies, Social economy strategies, Co-construction of policies, Policy evaluation.

ECONLIT DESCRIPTORS: J54, P43, P13, R58.

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RESUMEN: Este trabajo analiza las investigaciones sobre políticas públicas de fomento de la economía social, incluyendo a cooperativas y entidades no lucrativas, publicadas en las últimas décadas. Para este análisis se utiliza una matriz de investigación con capacidad heurística para captar las dimensiones clave que caracterizan a estas políticas. Se aborda el concepto de la política de economía social, qué racionalidad justifica el despliegue de estas políticas y qué modelos principales de políticas se han implementado. Indaga sobre cuáles son los actores responsables de su activación y de su implementación, cuáles son los principales instrumentos de estas políticas, qué modelos de gobernanza y gestión utilizan, qué adecuación organizativa e institucional de las políticas de economía social se requiere, cómo deben de evaluarse estas políticas, qué factores contribuyen al éxito o reducen la eficacia de estas políticas de economía social y, se estudia la continuidad en el tiempo de estas políticas, en especial, su sostenibilidad política y financiera. Finalmente se proponen, a la luz de la investigación ya desarrollada, nuevas líneas de investigación futuras.

PALABRAS CLAVE: Economía Social, Cooperativas, Tercer Sector, Políticas públicas, Fomento del cooperativismo, Políticas transformadoras de economía social, Estrategias de economía social, Co-construcción de políticas, Evaluación de políticas.

Resumen amplio

Tres décadas de investigación sobre políticas públicas de economía social. Nuevas perspectivas para las políticas gubernamentales sobre cooperativas, entidades sin ánimo de lucro empresas sociales

Este artículo analiza la literatura científica publicada en las últimas tres décadas versada sobre las políticas públicas de fomento de la economía social. Este análisis se enmarca en un doble contexto, por un lado, el ámbito de intervención de estas políticas, la economía social -formada por cooperativas, asociaciones, mutuales, fundaciones y empresas sociales- constituye un sector socioeconómico intermedio entre la economía pública y la economía privada capitalista, con amplias funciones sistémicas en especial para generar empleo, cohesión social y redistribución de las rentas. Y, por otro lado, auspiciadas por un creciente reconocimiento internacional de la economía social, numerosos gobiernos nacionales e instituciones internacionales han desplegado políticas de fomento de este ámbito. La literatura científica orientada al estudio de estas políticas de economía social ha sido prolífica.

Objetivos

El principal objetivo de este artículo es ofrecer panorámica analítica de las investigaciones sobre políticas públicas de economía social publicadas en las últimas décadas. Para este análisis se utiliza una matriz de investigación con capacidad heurística para captar las dimensiones clave que caracterizan a estas políticas. A partir de esta matriz y de la bibliografía existente, el artículo analiza los avances realizados en cada una de estas dimensiones. Las preguntas clave que guían el análisis son las siguientes: qué es la política de economía social, qué racionalidad justifica el despliegue de estas políticas y qué modelos principales de políticas se han implementado. Se trata, por un lado, de conceptualizar este tipo de políticas y examinar si conforman un campo relevante dentro de las ciencias sociales, y por otro, de analizar qué políticas son susceptibles de ser desplegadas y en qué se diferencian unas de otras. También se indaga sobre cuáles son los actores responsables de su construcción y aplicación, cuáles son los principales instrumentos de estas políticas, qué modelos de gobernanza y gestión de estas políticas, qué adecuación organizativa e institucional de las políticas de economía social se requiere, cómo deben de evaluarse estas políticas, qué factores contribuyen al éxito o reducen la

eficacia de las políticas de economía social y finalmente, se estudia la continuidad en el tiempo de estas políticas, es decir, su sostenibilidad política y financiera.

Metodología

Esta investigación utiliza, para la recopilación y selección de la literatura relevante, una metodología mixta basada en el análisis cualitativo de revisión narrativa, complementado por la revisión sistemática de la literatura bases de datos clave como Scopus, WoS y Dialnet. La revisión narrativa cualitativa se basa en 25 años de investigación en el campo, participando en proyectos de investigación sucesivos los cuales han facilitado el acopio de los principales avances, áreas problemáticas y futuras líneas de investigación. La relevancia de esta última deriva, por un lado, de la diversidad terminológica y conceptual del campo (economía social, economía solidaria, tercer sector, empresas sociales, etc.), de modo que gran parte de la producción académica no está bien indexada en las citadas bases de datos y se produce en múltiples idiomas, y por otro lado, porque amplia literatura se produce en ámbitos ajenos a los de las revistas científicas clásicas indexadas, lo que complica su sistematización.

Resultados

Desde la perspectiva del ámbito de intervención, las políticas de economía social son deudoras de la concepción de la economía social utilizada. Al respecto, ésta ha sido históricamente objeto de fragmentación conceptual, con nociones que van desde la economía social al sector no lucrativo y voluntario y a la economía solidaria y empresas sociales, visiones con proyectos sociopolíticos diferentes. Ello ha dificultado su inclusión coherente en políticas públicas.

En gran parte ligado a la concepción de economía social de referencia, se han identificado dos enfoques principales en los objetivos de las políticas de economía social. En primer lugar, un enfoque instrumentalista, que concibe a la economía social como una herramienta para resolver fallos del sistema (desempleo, exclusión, etc.), desarrollando políticas sectoriales específicas. En segundo lugar, un enfoque holístico y transformador, que considera a la economía social como un vector de cambio sistémico capaz de generar prosperidad inclusiva. Desde este segundo enfoque se conciben las políticas transversales que integran la ES como eje estratégico en la agenda pública, políticas que se denominan también políticas de segunda generación o políticas transformadoras de economía social. Ambos enfoques se corresponden a dos grandes olas de políticas de economía social identificadas por la literatura: una primera generación, sectorial e instrumentalista, y una segunda generación, transversal y transformadora. La primera generación responde a problemáticas específicas mediante instrumentos simples, como subvenciones o incentivos al empleo en cooperativas. La segunda generación busca transformar el sistema socioeconómico, integrando la ES en los marcos generales de política pública, bajo una lógica de gobernanza participativa y transversalidad institucional. En la actualidad ambos modelos coexisten, sin embargo, el segundo está adquiriendo cuerpo tanto en la praxis como en la investigación sobre estas políticas.

Entre los factores que potencian el éxito de estas políticas de economía social la literatura destaca el reconocimiento institucional del concepto de economía social, la existencia de marcos legales, la existencia de alianzas estratégicas entre actores públicos y privados del ecosistema territorial de economía social y la participación activa de la sociedad civil vinculada a la economía social.

Conclusiones y líneas futuras de investigación

El análisis de la literatura sobre políticas de economía social revela que se trata de un campo de investigación en expansión a nivel internacional, y desarrollado desde perspectivas disciplinares y enfoques múltiples. Ello a la par que este ámbito de intervención gubernamental constituye también una realidad en expansión, con prácticas que se han extendido en todos los continentes y en los diferentes niveles de gobierno, desde supranacionales a locales.

Entre los estudios sobre políticas de economía social destacan aquellos que analizan la evolución de la naturaleza de estas políticas. En concreto, analizan el proceso de evolución desde enfoques sectoriales hacia políticas transversales y transformadoras. Este cambio de paradigma de gran calado ha sido posible merced a un cambio en la visión sobre la funcionalidad de la economía social, pasando ésta de una visión sectorial y ligada a problemáticas concretas, como el empleo o la vulnerabilidad socioeconómica a una visión más amplia. Esto último ha permitido incorporar la economía social como eje estratégico en diversas agendas gubernamentales e internacionales, destacando su potencial multifuncional para generar prosperidad inclusiva en un contexto de transformación sistémica.

Entre los principales retos identificados por la literatura sobre políticas de economía social se encuentra la problemática de la fragmentación conceptual y operativa, la integración de estas políticas en las estructuras gubernamentales tradicionales. Se destaca que la eficacia de estas políticas depende de múltiples factores, como un liderazgo político fuerte, una gobernanza participativa y la institucionalización de marcos políticos adecuados.

Estas investigaciones muestran que las políticas de economía social se enfrentan a múltiples riesgos, como la instrumentalización gubernamental (isomorfismo institucional), los problemas de continuidad ante cambios políticos y la vulnerabilidad ante políticas externas adversas. La construcción de coaliciones amplias y resilientes entre los actores públicos y privados del ecosistema de economía social constituye un factor clave para enfrentar estos riesgos. También plantean cuestiones clave, como la decisión sobre el nivel de gobierno pertinente para su aplicación y la importancia de los espacios de diálogo y deliberación, que suelen situarse en los niveles mesoeconómicos.

A pesar del creciente interés científico y del notable despliegue de las políticas de economía social, éstas aún no gozan de un grado pleno de institucionalización, consolidación y de reconocimiento, como sí gozan otras políticas como la industrial, laboral o la agrícola. La investigación sobre las políticas de economía social, a pesar de estar bien establecida en algunos aspectos, sigue sin gozar del reconocimiento que reciben otras investigaciones sobre políticas gubernamentales. Es destacable que una gran parte de los avances investigativos sobre políticas de economía social ha sido impulsada en gran parte por el pragmatismo político, desarro-

llándose en forma de investigación-acción y de investigación colaborativa entre administraciones públicas, entidades representativas del sector y mundo científico, más que unívocamente desde la investigación estrictamente académica.

La revisión bibliográfica permitió también identificar importantes áreas para futuras investigaciones. En primer lugar, es necesario profundizar en el estudio de las condiciones necesarias para que los gobiernos activen estas políticas, teniendo en cuenta factores políticos, institucionales y culturales. En segundo lugar, se necesitan más estudios empíricos comparativos entre países y territorios, con el fin de contrastar contextos nacionales caracterizados por bajos niveles de desarrollo de la economía social y escasa implementación de políticas de apoyo, con contextos caracterizados por niveles avanzados de desarrollo de la economía social y de políticas gubernamentales de fomento. En tercer lugar, la adecuación institucional, es decir, el modo en que estas políticas se integran en las estructuras gubernamentales existentes y se vinculan a las dinámicas administrativas existentes, constituye otro ámbito de estudio fundamental. Una cuarta área a investigar versa sobre la evaluación de estas políticas, avanzando en las técnicas de evaluación adaptadas a las idiosincrasias de estas políticas, como nuevas métricas e indicadores de impacto, pero también analizando las asignaciones presupuestarias entre los distintos niveles de gobierno y entre las distintas políticas. Por último, el análisis de los factores que favorecen o dificultan la sostenibilidad a lo largo del tiempo de las políticas de economía social, en contextos de fluctuaciones políticas, financieras y económicas, constituye otro ámbito central en el que seguir investigando.

1. Introduction¹

Social economy public policies constitute a living and expanding reality worldwide and therefore represent a relevant field of study in the social sciences. There is extensive evidence of this growing government policies that promote the social economy: the implementation of national plans and multiannual strategies for the promotion of the social economy in many countries and regions², including Spain, Germany, Quebec, Ecuador and Republic of Korea; the actions of ministries and government agencies whose name contains the social and solidarity economy in France, Brazil and Spain; and the approval of social economy laws in Mexico, Tunisia, Portugal, France, Poland, Spain and Greece. At the international level³, evidence includes: the implementation of the European Commission's European Social Economy Action Plan; the recommendation on developing social economy framework conditions of the Council of the European Union (EU); the declaration of the Mercosur Parliament of South America to boost the social economy through public policies; the 10-year Social and Solidarity Economy (SSE) Strategy of the African Union; the resolution of the United Nations (UN) General Assembly promoting the social and solidarity economy for sustainable development; the ILO's International Labour Conference resolution concerning decent work and the social and solidarity economy;

1. The author would like to express his gratitude to the three reviewers. Their comments and contributions have improved the article. Also, thanks to the English language expert Adam King for language support in writing this paper.

2. The concept of the social economy (also known as the social and solidarity economy, abbreviated to SSE) adopted in this article is based on the one set out in the aforementioned UN resolution of 2023 and in the EC European Action Plan for the Social Economy of 2021. This concept encompasses cooperatives, mutual societies, associations, foundations, non-profit organisations and social enterprises as part of the social economy. They are all forms of production characterised by specific internal rules of behaviour. Together, they form a broad socio-economic reality situated between the public economy and the private capitalist economy (see Chaves & Monzón, 2012). In this paper, it is considered that social enterprises, the solidarity economy, the non-profit sector, the voluntary sector and the third sector form part of the social economy.

3. Relevant recent official documents are the following:

European Commission (2021). Building an economy that works for people: an action plan for the social economy. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:52021DC0778> (Accessed 1/3/2025)

ILO (2022). Resolution concerning decent work and the social and solidarity economy.

https://www.ilo.org/wcmsp5/groups/public/---ed_norm/---relconf/documents/meetingdocument/wcms_848633.pdf (Accessed 1/3/2025)

OECD (2022). Recommendation of the Council on the Social and Solidarity Economy and Social Innovation, OECD/LEGAL/0472. <https://legalinstruments.oecd.org/en/instruments/OECD-LEGAL-0472> (Accessed 1/3/2025)

Council of the European Union (2023). Recommendation on developing social economy framework conditions (C/2023/1344).

<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32023H01344> (Accessed 1/3/2025)

United Nations (2023). Promoting the social and solidarity economy for sustainable development.

<https://unsse.org/wp-content/uploads/2023/04/A-77-L60.pdf> (Accessed 2/3/2025)

African Union (2024). Strategy for the Promotion of the Social and Solidarity Economy.

https://au.int/sites/default/files/newsevents/conceptnotes/43938-CN-ENGLISH-CONCEPT_NOTE-5TH_STC-SDLE.pdf (Accessed 1/3/2025).

and the Recommendation of the Council on the Social and Solidarity Economy and Social Innovation of the Organisation for Economic Co-operation and Development (OECD).

The *social economy policies* as scientific literature area of study has been prolific since the year 2000. This paragraph offers an initial general overview of this literature. Scholars have performed international comparison studies (Chaves & Monzón, 2000; Kendall, 2009; Gidron & Bar, 2010; Chaves & Demoustier, 2013; Castelao & Srnec, 2013, CIRIEC/EESC, 2018; Utting, 2017; OECD, 2020; Jenkins et al, 2021; Bonnici & Klijn, 2023), as well as studies of countries including Argentina, Colombia, France, Republic of Korea, United States, South Africa, Tunisia, United Kingdom, Australia, Poland, Canada and Spain (Abramson, 2016; Alvarez, 2016; Chaves, 2002; Lyons & Passey, 2006; Loxley & Simpson, 2007; Rymsza, 2009; Phillips & Goodwin, 2014; Chaves, 2020; Fraisse, 2022; Sánchez, 2024; Seo, 2024). Studies have focused on legal forms such as cooperatives (Cornforth, 1984; Vienney, 1985; Correa, 2022) and non-profit organisations (Gidron, Kramer & Salamon, 1992; Kuhnle & Selle, 1992). Research has been conducted from a sectoral approach by *policy field*, focusing on agricultural policy, labour policy and others (e.g. Itçaina & Richez-Battesti, 2018; Bastida et al., 2021; Lasa et al., 2023). Others have centred on specific public policy instruments such as legislation, taxation, subsidies and public procurement in the social economy (Pestoff, 1998; Fajardo, 2012; Herrero, 2015; Salamon & Toepler, 2015; Vaño, 2022; Catalá et al., 2024a). Other studies have focused on governance and the policymaking process, advocacy and the inclusion of the social economy/non-profit sector in the political agenda (Kendall & Anheier, 1999; Gidron & Bar, 2010). Problematic areas in these policies have also been analysed, such as the difficulty of moving from supportive political discourses to activating real policies (Chaves & Savall, 2013 and 2019) and the hindrances, or even obstacles, created by certain government policies (e.g. budgetary austerity and privatisation policies) to the development of the social economy (Salamon, 1986; Pape et al, 2016 and 2020). Finally, other literature has analysed, from an evolutionary perspective, how public policies in support of the social economy have greatly shifted from first-generation policies (sectorised on the basis of legal forms and public policy problems) towards transformative second-generation policies over the last three decades (Chaves, 2020 and 2025).

This field of study has attracted the interest of a large scientific community across many countries. Several notable research groups and networks have analysed the public policies of the social economy at the international level: (1) the English-speaking network associated with professors Kendall, Salamon, Zimmer and Gidron, focusing on analysing governance and the inclusion of third sector and non-profit sector entities in the political agenda and public policies of both national and European governments; (2) the network linked to the International Centre of Research and Information on the Public, Social and Cooperative Economy (CIRIEC), which has produced publications such as *The emergence of social economy in public policies*, reports for the European Economic and Social Committee and national studies in Spain and France; (3) the network connected with Ibero-American authors such as Coraggio, Singer, Hintze, Danini, Muñoz and Srnec, which is associated with the solidarity economy approach and alternatives to capitalism; (4) the network linked to the international entities Global Social

Economy Forum (GSEF), the International Labour Organization (ILO) and the United Nations Institute for Social Development (UNRISD), with prominent researchers including Utting and Jenkins; and (5) the Canadian network associated with Mendell, Downing and Tremblay.

Despite this albeit scattered abundance of literature in this field, few studies have offered a comprehensive overview of the knowledge acquired to date, based on rigorous analysis. The main difficulty with this intellectual task lies in its complexity. First, the area of intervention of *social economy policies*, namely the social economy, has, until very recently, lacked consensus as to its meaning, the language used and its socio-political scope and projection. Second, given this lack of consensus, complexity arises because of the fragmentation that has characterised these policies, segmentation based on the legal forms of the social economy and differing views on the public policy problems to be addressed. Third, the prevailing pragmatism in the construction of the body of knowledge on these policies is explained primarily by the fact that knowledge has stemmed more from the practices of policymakers -who require useful knowledge and operational tools for their work- than from scientific production.

The aim of this article is to provide an overview of the research and publications on public policies for the social economy produced in the last three decades, highlighting the trends in research questions and theoretical frameworks. To this end, the first sub-objective is to define what is meant by *social economy policies* and to examine whether it constitutes a relevant field within the social sciences. Accordingly, the aim is to analyse which policies can be and are in fact applied in this field and how they differ from each other.

To achieve these aims, a research matrix with a heuristic capacity to grasp the key dimensions that characterise public policies is presented. Based on this matrix and the existing literature, the article analyses the progress made in each of these dimensions. This matrix is articulated around the following key questions: What is social economy policy? What is the rationale for its implementation? Why is it important today? Who are the actors responsible for its creation and implementation? What are its main instruments? And, finally, how should social economy policy be evaluated? These questions provide guidance for an exhaustive analysis that enables assessment of not only the existence and functionality of social economy policies but also its capacity to fulfil the socio-economic objectives that justify its implementation. The article is structured around these key questions. First, the methodology and theoretical framework are presented, followed by an analysis of the key dimensions of social economy policies that have been addressed in the scientific literature.

2. Methodology

The analysis of the scientific literature on social economy policies carried out in this paper is based on a theoretical framework of analysis of the field of study, as well as a methodology of compilation and selection of key references corresponding to this literature.

2.1. Analytical framework

The starting point of the analysis is to delimit the field of study by proposing a definition of social economy policy. Next, the research matrix is presented with the questions that act as a guide for the research agenda in this area.

The definitions of public policy and economic policy are *undeniable* pillars of the definition of social economy policy. Unfortunately, there is no academic consensus for either concept. The variety of definitions ranges from very broad definitions, such as that of Dye (2008:1), who states that a public policy “is everything that governments decide to do or not to do”, to more precise definitions, such as that of Tamayo (2003), who states that “public policies are the set of objectives, decisions and actions that a government carries out to solve the problems that citizens and the government itself consider to be a priority at a given time”. In turn, economic policy is an aspect of public policy. It is government intervention in the economy. In the words of the Dutch economist Tinbergen (1961), “economic policy is the deliberate manipulation of a number of means in order to achieve certain ends of an economic nature”.

In this context, if the economic system is conceived as a plural system (Laville, 2011) composed of three institutional sectors (the public, the private for-profit and the private social economy), rather than two (the public/state and the private/market, as the orthodox economic literature has stressed), social economy policy is government intervention aimed at increasing the space of the social economy in the system. It refers to the generalisation of principles, behaviours and incentives that are typical of the social economy to the economy as a whole.

After defining *social economy policies*, it is necessary to characterise it by analysing several dimensions. (1) The existence of a well-defined sphere of reality, which is the area of public intervention. In the current case, this is the field of the social economy. (2) A conception of the area of public intervention associated with the broad objectives of government policy, as well as a conception of social economy policy. This policy therefore requires a theory of public intervention and a prioritisation of the government’s intervention agenda. (3) social economy policies must have a responsible public agency or administration that designs, promotes and implements the corresponding strategies and measures. The *polymakers* within this agency can lead this policy, assuming the role of *policy entrepreneurs* (Kingdom, 2011), or can involve actors that lie outside the public sphere (Habermas, 1989) but that belong to the social economy ecosystem. Public-private governance of social economy policies is known as social and civil dialogue (or social concertation), with public and private actors jointly acting as *polymakers*. (4) The existence of explicit objectives in public policies aimed at this area of public intervention. (5) The existence of mechanisms for evaluating the impact of these instruments that relate to predefined objectives and are appropriate to the conception of this policy. (6) Identification of the factors that are conducive to the success and effectiveness of these policies and identification of the factors that hinder them.

2.2. Methodology for data collection

The methodology used for the collection and selection of relevant literature in this study is mixed methodology based primarily on a qualitative analysis (*narrative review*), complemented by a systematic literature review of key databases. The latter avoids the exclusion of relevant literature. The qualitative narrative review analysis is based on 25 years of research in the field of social economy policies, with participation in specialised research working groups, conferences, seminars and networks, which enabled the identification, systematisation and analysis of the most relevant references. It will soon be available on a website specialising in this area of study. The documents include more than 20 key international studies, offering a broad and comparative overview of this field. All of these studies are cited at the end of the article. These studies facilitate the identification of the main advances, problem areas and future lines of research in this field.

The systematic review was conducted using three databases: Scopus, Web of Science (WoS) and Dialnet. A number of key search terms were used, such as “public policy”, “social economy” and related terms in French, English and Spanish. Special attention was paid to journals specialising in the social economy and related fields housed by the CIDEC documentation centre of CIRIEC and the University of Valencia. After double systematic filtering of research on the field of study, 256 references were identified. More than 100 of the most relevant references are cited at the end of this article. It is important to highlight the difficulty in identifying research related to social economy policy because, historically, this field has been interpreted in different ways, giving rise to different conceptualisations and terminologies, which have fuelled confusion.

The prioritisation of qualitative narrative analysis with a selection of key publications rather than a systematic literature review is justified by the weaknesses of systemic literature reviews in relation to this field of the social sciences. First, the main international databases, Scopus and WoS, are not adequate means of collecting and compiling bibliographic material for this field of research. Exclusively using these databases generates serious biases in the selection of publications. These biases primarily derive from the fact that Scopus and WoS are eminently English-speaking databases, marginalising scientific production in other languages, with much of the literature in this field being published in other languages. Second, both databases mainly comprise articles published in scientific journals that are considered the most prestigious and best positioned in the citation rankings, excluding the abundant knowledge published in other scientific journals, high-quality books, doctoral theses and other relevant studies published outside the academic world, including by international organisations and institutions and other entities promoting knowledge (e.g. the research services of UNRISD, ILO and OECD), where there has been a boom in the production of studies. In these areas, there has been a process of cooperation in the collaborative production of knowledge between academia, actors and *policymakers* due to the need for practical and empirical documents that are useful for actors and policymakers alike.

Third, the social economy is still establishing itself as a field of study in the social sciences. It is progressively entering the most prestigious journals in the English-speaking world, but most of the knowledge is produced outside. Its entry occurs as Scopus and WoS add new journals, which have positioned themselves in the intermediate or upper quartiles of their rankings (e.g. *Revue internationale de l'économie sociale*, *Ciriec-España revista de economía pública, social y cooperativa*, *Revesco – revista de estudios cooperativos* and others). The bias in favour of the English-speaking world means that the term “social economy” is not very visible because it is still not widely accepted in this world, unlike other concepts that are more closely associated with this language, such as “social enterprises”, “third sector”, “non-profit sector”, “associative sector” and “cooperative sector”. It is only in recent years, with the broadening of both databases to non-English-language journals, that this bias has been reduced, albeit not eliminated. Fourth, these databases do not fully reflect the confusion that surrounds the words used both in academia and in society to understand the area of intervention of social economy policy, namely the social economy.

3. Results

3.1. The social economy: an area of public intervention with varying scope and outlook, up to this decade

The social economy, conceived as the intermediate space between the public economy and private capitalist enterprises, has historically lacked consensus as to its conceptual delimitation. This disagreement has had a major impact on public policies aimed at its development. The corresponding range of conceptions and paradigms has led to a marked sectorisation of these policies based on the legal forms of social economy entities and the public policy problem areas in which to intervene (on the sectorisation of policies, see Muller, 1985). It is only recently that progress has been made in the cross-sectionality of these policies under an integrative perspective.

In fact, since the 1970s, both academia and social economy actors have proposed a plethora of closely related, but not equivalent, terminologies and definitions relating to this field, the most relevant being social economy, non-profit sector, solidarity economy, social and solidarity economy, social enterprises and third sector (Chaves & Monzón, 2018; CIRIEC/EESC, 2017; Teasdale et al, 2023; Galera & Chiomento, 2022; European Commission, 2024). This diversity of concepts relates to a wide spectrum of theories and foundations (Chaves & Monzón, 2018). In other words, the social economy, as well as its related paradigms, is a multidimensional concept whose definition is highly dependent on the approach. In the article “What’s in a name? Making sense of social enterprise discourses” Teasdale explains that, even with the same terminology, the meaning of the term *social enterprise* has differed and varied over time. CIRIEC

reports for the European Economic and Social Committee (e.g. CIRIEC/EESC, 2017) note the degree of visibility and acceptance of this range of concepts in the EU, revealing greatly disparate realities by country.

These transversal or second-level concepts of the social economy, which, under a common and coherent microeconomic logic, aim to group together various forms of entities and enterprises that are in neither the public nor the capitalist economy, are joined by the first-level units of the social economy (i.e. the multitude of specific legal forms adopted by the entities of the social economy). They vary greatly, ranging from agricultural, consumer, credit, service and housing cooperatives to mutual societies, voluntary associations, organisations providing social and health services and general interest public law corporations, among others, each of which is particularly active in specific economic sectors or *policy fields*, such as agriculture, housing, social services and finance. In addition to the conceptual diversity that generates fragmentation (*cloisonnement*) by second-level concept, there is also fragmentation by legal forms, resulting in an atomised landscape. The diversity in the terminology has not prevented different statistical studies of the social economy from revealing that it is an extremely important area of the recent and current social reality. In Europe, for example, it provided more than 14 million jobs in 2015, accounting for 6.4% of the employed population. However, this socio-economic reality varies greatly both between countries and over time (Defourny & Monzon, 1992; CIRIEC/EESC, 2017; European Commission-EISMEA, 2024).

Language constructs social imaginaries both to explain reality as a whole and to guide the actions of public and private actors. The disparity of concepts and views within the social economy has generated confusion and slowed down scientific progress in the field. The scientific literature is atomised along these lines. With time, pedagogy and advocacy, this conceptual fragmentation has diminished, but it has not disappeared. Some particularly significant milestones have occurred in recent years, with the institutionalisation of the concept by international organisations and institutions, including those mentioned at the beginning of this article, among which is the United Nations.

Government intervention in this area of the social economy has not been spared this conceptual problem. Until a few years ago, government policies on the social economy addressed these sectorised views through a diversity of approaches and concepts of the third sector/non-profit/social economy and through the main legal forms (agricultural cooperatives, non-profit socio-health entities, mutual societies, worker cooperatives, etc.), as well as the public policy problem areas (*policy fields*: labour issues, social insurance, rural and agricultural development, social welfare services, etc.) by involving the legal forms of the social economy that were most useful for these public objectives. This has contributed to a high level of sectorisation of social economy policies. In other cases, *policymakers* have been confused by this difficult-to-grasp conceptual landscape due to semantic and lexical dispersion, which has led to inaction in this area of intervention.

3.2. The objectives of public policy for the social economy

What is the sense of public authorities' deployment of social economy policies? What is their economic justification? Why are such policies essential in the current context? These questions are fundamental to determine the model of public policy that should be implemented, its governance, its management, its instruments and its evaluation.

The literature presents two views of the objectives and functionality of the social economy in public policies. The first view conceives the social economy, or rather the families and forms of social economy entities, in an instrumentalist and remedial way in terms of the failures of the system (Vienney, 1985; Archambault, 1986). It recognises the usefulness of these families and forms in providing solutions to specific socio-economic issues, including employment, the provision of social services and agricultural problems. Consequently, it integrates the forms of the social economy that are best suited to these problems into public policies that are sectorised by problem area. The result is not only the atomisation of the field of the social economy into a disparate set of sectoral policies but also an organisational structuring of the social economy movement by *families*.

The sectorisation of policies is based on targeting a specific problem area with a sectoral objective (agricultural policy, employment policy, housing policy, social policy, regional policy, etc.). Each of these departmentalised policies is usually the responsibility of a single ministry (Muller, 1985). These sectorised policies encompass the forms of SSE entities that are most relevant for each sectoral policy, namely those that are most useful in relation to the problem area (e.g. agricultural cooperatives in relation to agricultural policy or non-governmental organisations in relation to social development cooperation policy). In other words, sectoral public objectives entail specific forms of SSE entities.

A second view conceives the social economy as a vector of social change and transformation insofar as it simultaneously fulfils multiple functions in the system, not just one, underscoring in particular its potential to transform the system as a whole. Rather than emphasising its unifunctionality, this view highlights its capacity to generate *inclusive prosperity*, a concept that more accurately reflects its multifunctional nature (Chaves, 2025).

From sectorised policies to cross-cutting policies. Introducing the dimension of institutional sector, cross-cutting policies present an overall institutional sector (or a sub-sector such as cooperatives or non-profit organisations) as a field of action. It is therefore a field below the economy as a whole. Chaves and Gallego (2020) call the latter *transformative social economy policies* or second-generation policies. From this point of view, the social economy is seen as an objective in itself, with a broad transformative capacity and scope. Progressive intellectuals, especially from Ibero-American countries (Coraggio, 2004; Hintze, 2010; Castelao & Srnec, 2013; Ochoa & Fuenmayor, 2015; Vega, 2016; Vitali & Oulhaj, 2021; Rojas, 2023; Muñoz, 2024), who have witnessed the inclusion of the social economy in political changes in countries including Ecuador, Brazil, Mexico and Venezuela, view the social economy as an alternative policy for far-reaching social transformation, in the core of the transformative political agenda.

Another group of intellectuals (Bouchard, 2009; Rousselière et al, 2024) considers that the social economy contributes significantly to general interest objectives, especially those associated with major current problems such as inequality, the concentration of economic power, armed conflicts, the climate and digitalisation crises, although without linking them to political agendas. The position of international institutions such as the UN, the OECD, the ILO and the Council of the EU in their resolutions and recommendations in recent years also follows this second line of thinking.

From instrumental objectives, associated with sectorised policies, the discussion moves on to general objectives with transversal and *cross-cutting (mainstream)* policies. The social economy must be considered from a doubly transversal perspective, given that it transcends atomisation by legal forms to encompass the whole of the social economy, while transcending sectorisation by specific problem areas to influence the general objectives of the system.

This change in the conception of the usefulness of the social economy affects the intermediate objectives that are set, as well as the public policy instruments that are used. Clearly, the shift from a specific objective of improving access to decent employment for vulnerable groups to a broad objective of generating inclusive prosperity is extremely important, affecting governance, the instruments used and the level of complexity in evaluating policies. This does not prevent first-generation instrumental policies from coexisting with second-generation policies.

3.3. A conception of social economy public policy theory

What is the architecture of social economy policies? Its architecture depends on the view of the reference social economy. It varies from an instrumentalist view of the social economy, typical of first-generation policies, to a holistic and transformative view of the social economy. Chaves (2025) identifies the differences between these two models of policy architectures in terms of governance and management criteria, instruments and evaluation mechanisms.

The architecture of instrumentalist social economy policies, or first-generation policies, has several characteristics. (1) The promoter of these measures is the central government, which sets basic guidelines, while regional governments implement and manage these measures. In some cases, when the regional government has more financial leeway and political commitment, it enhances these measures with more funding and new lines of support. (2) The *polymakers* (i.e. those who make these policies) are the political decision-makers and senior civil servants of the public administration. They play a direct role (*top down*) in the creation and management of social economy policy. The involvement of representative social economy organisations is limited, with recurrent demands to participate in social and civil dialogue. (3) The public policy *instruments* or measures are technically simple and highly dependent on budget availability. An example is the annual subsidies from the Ministry of Labour in Spain to support the creation of corporate employment in cooperatives and worker-owned companies.

However, there are also policy innovations, such as the measure that allows the capitalization of unemployment benefits in a single payment aimed at the creation of cooperatives. (4) These measures are *evaluated* on the basis of quantitative effectiveness criteria (e.g. number of jobs and enterprises created), efficiency and relevance (Chaves-Serra, 2011). (5) These measures to promote the social economy are poorly integrated into the general policies of regional governments, which reveals their low *priority* on the political *agenda*.

The architecture of transformative social economy policies, on the other hand, is based on transversality, on co-construction and co-implementation and on the complexity of instruments, strategies and evaluation. Mainstreaming is understood both in terms of its broad conception of the scope of the social economy, ranging from cooperatives to third social sector entities, and in terms of the areas of government intervention. It overcomes the compartmentalisation and sectorisation typical of first-generation policies and, with it, the traditional ghettoisation of social economy policies, which are marginalised with respect to general government policy.

The cross-cutting nature of the social economy is twofold: in terms of the variety of forms of entities that make it up (cooperatives, mutual societies, associations, foundations and social enterprises) and in terms of the social utility of the social economy. In relation to its social utility, as indicated earlier, the cross-cutting approach goes beyond the reductionist approach of recognising a single function per type of entity (e.g. job creation and maintenance of worker cooperatives), instead adopting a broad and holistic approach to the functionality of the social economy in the system by considering it as having a multifunctional systemic role, which fits well with the concept of inclusive prosperity. In this sense, *the social economy generates inclusive prosperity*, transcending the economic dimension of wealth and employment generation to include other dimensions such as equity in distribution and attention to social welfare, vulnerable groups, the environment and political and civil rights and values (Catalá et al., 2024b; Chaves, 2025).

These transformative policies are intended to be integrated into the general policies of governments, following a *mainstreaming approach*, affecting multiple portfolios of responsibilities. This qualitative leap in policy approach requires a change in the internal organisation and management of governments. This policy needs to be coherently integrated and strategically aligned with overall government policy, under the leadership of a specific interdepartmental body within the public administration. This could take the form of a commissioner playing a proactive role in driving new public policy initiatives and possessing the capacity to coordinate and mobilize agencies, services, and other public sector entities, thereby generating a multiplier effect in administrative action.

Another distinctive feature of the architecture of this new generation of policies is their high degree of complexity both technically and in terms of governance and management. They involve moving from a policy model with a simple, unsystematic and unscheduled design to a more complex model. They have a longer than annual time horizon. They represent an innovation in terms of policy design and instruments, adapted to the ecosystem and partnership approach (Levesque, 2016). These policies generally start with the adoption of social economy laws and then develop structured strategic plans with objectives, axes, measures, monitoring

and evaluation criteria and procedures, executing agents and so on. Priority is given to the ecosystem approach, activating and developing interaction between the agents of the ecosystem (associations, universities, administrations, financial entities, etc.). The active participation of these agents and of civil society in general is promoted. Training and dissemination spaces, learning through work and reflection, networks of socio-economic prescribers and drivers, research partnerships with universities, cooperative coworking spaces, territorial economic cooperation poles, new social and ethical banking, social markets, public-community collaboration and responsible public procurement are examples of these new instruments, which do not replace but add to first-generation instruments.

Table 1. Comparison of first- and second-generation social economy policies

Policy features	First-generation policies	Second-generation policies
Nature of the policymakers involved in policy development and implementation	A dirigiste approach, in which policymakers are understood in a narrowly sense, limited to the government apparatus	Partnership approach, with policymakers understood in a broad sense and broad citizen participation
Degree of integration of the policy into general government policies	Sectorised, with little integration into broad policy areas	A mainstreaming approach, with high integration and even a core position in general policies
Degree of complexity and technical design of the policy	Simple and cost-effective	Complex and systematised policies under a holistic and strategic approach to policy
Specific policy instruments	First-generation instruments: single-payment benefit, job creation, technical and investment subsidies, dissemination and structural subsidies	Second-generation instruments: athenaeums, social drivers, public procurement, coworking and specialised training
Policy evaluation	Quantitative criteria of efficiency, effectiveness and relevance	Quantitative and qualitative criteria, including participation, coherence and sustainability

Source: Based on Chaves (2020).

This second view of the systemic role of the social economy questions the respective roles of the three institutional sectors: the public sector, the private for-profit sector and the social economy. Mazzucato's (2023) perspective of the entrepreneurial state -understood as one that implements far-reaching, mission-oriented policies aimed at the public interest and engages a variety of co-contributing actors- is particularly relevant here: if the social and solidarity economy is aligned with and contributes to these missions, it should be fully and holistically integrated into such broad-based policies.

Another perspective, that of the *social market economy* (semantically very different from the concept of the social economy adopted in this article), is associated with the German post-war school of planning policies (*Ordnungspolitik*) and process (*Prozesspolitik*) (Chaves, 2002) and is also of interest in this context. Management policies aim at establishing or modifying the general framework of the economic system, affecting the basic institutions and the rules under which it functions. They are determined by the fundamental values and general objectives of a society, such as the maximisation of socio-economic efficiency (and not economic profit) and the preference for social interest over free competition. They define basic questions such as the degree of government decentralisation, the systemic space for the market and the public sphere, as well as the role of actors in the three institutional sectors. They affect phenomena including pre-distribution and redistribution. Broad government recognition of the usefulness of the social economy in the system legitimises the incorporation of this sector into the institutional, cultural and material framework of the system, establishing the framework conditions for its development, associated with general interest objectives. This does not exclude the SSE from also being included in process sectoral policies because it has properties in specific problem areas. The nature of evaluation strategies, instruments and mechanisms varies greatly.

3.4. Governance and management of social economy public policy

Who will drive SSE policies, decide on the objectives, instruments and means of evaluation, and manage and implement these policies? This question refers to *policy entrepreneurs and policymakers*. The inclusion of the social economy in the political agenda and the governance and management of these policies are issues that raise key questions. Which actors will promote or catalyse this inclusion and set an agenda for the development of the SSE? How will proactive governments emerge in contexts where actors and politicians have different political orientations and degrees of political sensitivity towards the social economy, *and* how will this be operationalised? These are other questions addressed by the literature (Gidron et al., 1992, 2010; Fraisse, 2022, 2024; Kendall, & Anheier, 1999; Laville et al., 2005, 2017; Savall, 2013).

Governance of the social economy policy, understood as the mode of constructing and implementing policies between various public and private actors aiming to promote the social economy, is crucial. According to Chaves (2020), in instrumentalist or first-generation social economy policies, the predominant approach is *top down*, in which those in charge of the administration and its senior officials are the protagonists. In contrast, transformative social economy policies or second-generation policies are characterised by broader participation and democratisation (*partenarial approach*). The latter approach prioritises the active participation of social economy actors throughout the entire public policy process, in partnership with the responsible government and its administration, following an approach of co-construction of these policies (Vaillancourt, 2009; Mendell & Alain, 2015).

There are two key elements in this opening process. The first relates to the social actors who are invited to participate, which may be only representatives of the social economy sector or also other mediating agents (Gaiger, 2005; Catalá et al., 2024a) belonging to the social economy ecosystem, such as universities and other external support structures for this sector. Second, the activation of mechanisms and spaces for participation and deliberation is crucial (Laville et al., 2005), whether they are informal or institutionalised. The latter are important not only for making decisions but also for generating identity and ownership, improving the quality of collective reasoning, legitimising decisions and fostering the active participation of all those involved.

3.5. Organisational and institutional adequacy of social economy public policy

The inclusion of a new policy such as social economy policy among the major responsibilities of governments requires institutional organisational arrangements in the sense of: institution-alising this policy; creating a new space within the public administration equipped with mechanisms for intra-governmental cooperation (i.e. with other agencies and entities of the central, regional and local administration); avoiding competition or inconsistencies between public structures; and ensuring external cooperation with private actors (Fraisie, 2022; Hintze, 2010).

The challenge is to fit this new social economy policies into existing structures and institutions. One question is which levels of government are most relevant and what intergovernmental articulation should be established? What kind of body should act as a driver, catalyst and implementer of the policy (e.g. a commissioner or an inter-ministerial commission)? What formal and informal bodies for social dialogue should be set up to maximise deliberative processes? What internal and external partnerships should be established?

This requires profound changes in government structure, including the creation of inter-ministerial commissions and policy spaces within existing institutions. It is crucial to define the relevant levels of government, articulate intergovernmental relations and promote internal and external alliances that strengthen implementation. In this process, it is essential to overcome the departmental and sectorised public perspective, to promote cooperation between public and private bodies and to abandon technocratic and top-down approaches, adopting participatory models in the design and management of programmes. This change also requires adapting the culture of public employees and replacing corporate and departmentalised views (Coraggio, 2004; Hintze, 2010).

3.6. Specific instruments of public policies for the social economy

What are the key instruments of social economy policies? Which instruments are most effective, most innovative and most efficient to maximise the creation, expansion, sustainability

and impact of the social economy? The scientific literature and, above all, the reports and manuals of the actors of these policies is particularly prolific in this field. Four key dimensions can be identified to understand the instruments for promoting the social economy: (1) the stage of development of social economy entities, (2) the technical nature of the instruments, (3) the social economy ecosystem and (4) the territorial dimension.

Depending on the stage of development, the literature distinguishes between *start-up* and *scaling-up* policies. The former aim to encourage the creation of new enterprises or innovative social economy enterprises by providing resources adapted to this purpose. The latter aim to strengthen already established entities and promote their growth and expansion. In other words, by adapting to the specific needs of each stage, start-up policies address the challenges of the start-up phase, whereas scaling-up policies focus on maximising long-term impact and sustainability. From the perspective of the technical nature of the instruments for the promotion of the social economy, the typology of *soft* and *hard* policies for the promotion of the social economy is of particular interest (CIRIEC/EESC, 2018). This perspective is complemented by the systemic view of measures articulated around multiannual plans and strategies for the promotion of the social economy. The holistic concept of an ecosystem makes it possible to visualise the interrelationships between the different levers and mechanisms that jointly foster the social economy (Levesque, 2016; Catalá et al., 2024a). Encouraging the creation and development of social economy ecosystems is another key axis in the development agenda for the SSE. Integration of the territorial, regional and local dimension in social economy policies is also important (Itçaina & Richez-Battesti, 2018). Partnerships between actors and the development of joint projects, articulated as public-private partnerships, have been prioritised. A paradigmatic instrument that integrates this territorial dimension, which has even been included in the French Social Economy Act of 2014, is the Territorial Cluster for Economic Cooperation (PTCE) (Fraisie et al., 2024).

The literature on the promotion of the social economy has identified a set of specific strategic instruments that have proven essential for the establishment and expansion of the social economy. Among these instruments, there is a prominent need for an appropriate regulatory framework in the form of legislation on legal forms and favourable taxation. Another instrument is to make preferences for the social economy in public procurement (e.g. with social clauses), which have been made possible in Europe, for example, thanks to specific directives and actions of the European Commission. Public-private partnerships, in various dimensions and functions, constitute another central axis, enabling synergies in key areas such as the provision of public goods and services. Other measures include business counselling, coworking and support platforms for entrepreneurs. Networks of prescribers and managers of social economy policies (e.g. the French Réseau des collectivités territoriales pour une SSE and the Xarxes territorials d'ESS of Catalonia), as well as of intermediary agents (Gaiger, 2005), are another action research instrument that highlights the relevance of the meso-economic level of analysis.

The promotion of inter-cooperation, production networks and social economy groups and clusters is another of the most widely studied and practised instruments. Financial instru-

ments include subsidies, contracts and agreements. The suitability of these instruments has been studied insofar as they are neither economically nor politically neutral because, as Kuhle and Selle (1992) warn, they can compromise the independence of social economy entities by plunging them into processes of institutional isomorphism. Other instruments include support for access to local, national and international markets. Finally, the training and development of human resources through the acquisition of specialised competencies reinforces the capacities of organisations and enables them to compete and adapt in dynamic and globalised environments.

3.7. The evaluation, measurement and impact of social economy policies

Closing the cycle of the public policy process, the evaluation of social economy policy has been another focus of attention in the specialised literature (see Chaves, Tio et al., 2011; Chaves & Savall, 2013; Herrero, 2015; Utting, 2017; Chaves, Via & García, 2020; European Commission, 2020; Cwiklicki & Pacut, 2023; Potluka, 2021; Vaño, 2022; Chaves et al., 2023; Rojas, 2023). Some of these studies have estimated the financial impact of these policies. For Spain, Herrero (2015) calculated how much cooperatives and worker-owned companies save by benefiting from a special tax regime. It was estimated that the amount was close to the total joint annual expenditure on these entities by the state and regional administrations responsible for employment promotion and cooperatives. Other studies have measured the impact of other instruments, assessing their effectiveness, the number of companies and individuals they benefit and contracts with administrations, among other features. The European Commission report (2020) presents an evaluation of a major policy, namely the European Commission's Social Business Initiative.

The shift from instrumentalist policies to transformative cross-cutting policies poses a challenge in the evaluation of these policies due to their greater complexity. As Chaves (2025) points out, new and more qualitative and holistic objectives, such as achieving more inclusive prosperity, coupled with a broader implementation horizon, are added to traditional quantitative objectives. The classic evaluation methodology based on the criteria of effectiveness, efficiency and relevance falls short and needs to be expanded by including, for example (Utting, 2017), new qualitative evaluation criteria such as those based on the capacity of the administration to carry out these policies, policy coherence, participation and sustainability, as well as new indicators for measuring effectiveness that transcend strictly classical economic criteria. Studies such as that of Chaves et al (2023) have identified key problems in the evaluation of this type of policy and have highlighted the need to establish new evaluation mechanisms that are more in line with the nature of social economy policy. For example, a mechanism remains to be developed to measure the effectiveness of these policies with tailored indicators that address the multifunctionality of the social economy and its capacity to generate inclusive prosperity (European Commission, 2024: see Chapter 5).

3.8. Factors contributing to the success or reducing the effectiveness of social economy policies

The deployment of social economy policies faces several challenges due to their innovative, partnership-based, cross-cutting and complex nature. According to Chaves and other authors, the first challenge is the recognition and visibility of the concept of the social economy, as well as its differentiation from for-profit enterprises, which is a prerequisite for the design of policies in this field. Furthermore, it is necessary to integrate and align these policies within the framework of existing government policies and strategies, avoiding duplication and ensuring coordination.

A critical obstacle stems from the cross-cutting of social economy policies, which means that it affects multiple administrative areas and clashes with the traditional compartmentalisation of public administrations. This situation requires overcoming bureaucratic resistance, institutional inertia and reluctance within the administration to adapt its rhythms and approaches to the needs of the social economy.

Another key challenge is the partnership approach, which prioritises democratisation and the active participation of external actors in the co-construction and implementation of these policies. This entails creating spaces for dialogue, building trust and mobilising coalitions of actors committed to social transformation. The lack of meeting spaces and catalysts, as well as the exclusion of new actors, can jeopardise the continuity of these policies.

Finally, social economy policy needs strong leadership within government, backed by legislation and political parties. This leadership should be assumed by a specific body that acts as a political entrepreneur and serves as a catalyst of initiatives and liaison with internal and external actors, thereby achieving an administrative multiplier effect and guaranteeing the sustainability of these transformative policies.

3.9. Political and financial sustainability of social economy policies

The sustainability of social economy policy, in the sense that it continues over time, especially in the face of changes of government, is another field that has been studied. Several authors (Castelao & Srnec, 2013; Utting, 2017; Vega, 2016; Seo, 2024) have carried out comparative analyses of experiences such as those of Ecuador, Brazil, Italy, Venezuela and Republic of Korea.

Government changes, which are not necessarily due to changes in political ideology, can interrupt the continuity of existing policies and the social economy development agenda, negatively affecting government funding, plans and strategies, legislative developments, bodies for social dialogue, specialised government agencies and specialised training, research and advisory mechanisms. These changes can also dilute or modify the meaning of these policies,

as well as the area of intervention itself, changing the focus on the latter (i.e. the social economy) for other related but different ones such as social entrepreneurship and social innovation.

Utting (2017) poses the following question: Can social and solidarity economy policies survive a change of government? What happens when a proactive government is replaced by another with a different sensitivity and political orientation towards the social economy? Are there political and institutional elements that need to be in place to ensure the continuity of a pro-SSE policy agenda in the face of changes arising from elections?

Although it is not possible to ensure such continuity in full, given that a significant political change could radically reverse the progress made in previous legislatures, Utting identifies *three key elements* of resilience to preserve these policies. First, the existence of a law that obliges public authorities to develop social economy policies is fundamental. These laws are intended not only to establish principles and institutions that favour social dialogue, policy design and resource mobilisation but also to require the state to provide comprehensive and continuous support through multiple institutions. A second key condition for sustainability lies in concertation, understood as social dialogue between various actors, including political parties, representative and proactive intermediary organisations and representatives of the social economy. The third essential factor is the active participation and social mobilisation of the social economy movement (i.e. its capacity for active mobilisation to defend its interests and keep the social and solidarity economy on the political agenda).

The continuity of social economy policy can also be questioned when there is a dissonance between expectations and achievements. If it does not meet expectations, either through formal or perceived evaluations, especially by its supporters, it generates disenchantment, which erodes its social legitimacy. This disenchantment can be quickly capitalised on by detractors, who construct a reactionary rhetoric that presents the policy as ineffective and a waste of public resources, in the sense indicated by Hirschmann (1991) for development policies, feeding back into the process of delegitimising of these policies and thus blocking possible advances.

Another element is whether this policy has sufficient *government sustainability*, in the sense of whether it has political entrepreneurs to drive it and whether it is able to maintain the necessary alliances and coalitions of external and internal actors that established it. In terms of the role of political entrepreneurs, leaders and drivers of this policy, it needs to have *the right succession*. This role has often been played by people from cooperative and social economy federations and organisations with strong soft skills. In some cases, they directly occupy positions of responsibility in government, but internally in the administration they have to be able to mobilise and involve two other types of actors: senior civil servants and bureaucratic systems.

Its sustainability must be guaranteed *by reproducing the political pacts and alliances* with the actors that gave rise to it. From another perspective, tensions can come from outside or from within the coalition of political actors that sustains this policy. From the outside, third-party actors with different views and strategies can have an impact, such as social enterprises and B Corporations, which, if included in the coalition, can create tensions and dilute the political agenda of the social economy. Tensions between families of SSE entities can arise from within. For example, cooperatives can disengage from the policy and cause an internal fissure in the

coalition of actors. The sustainability of the social economy policy requires the maintenance of the alliances that have created it and the neutralisation of the elements that may question, discredit or detain it. Adequate media management of this policy is another key element in this regard.

4. Discussion

For a fully consolidated public policy, both in practice and in theory, the question is: What is missing from this public policy for the social economy to be viewed as already mature enough to progress and be considered on an equal footing with other more established government policies such as employment policy, industrial policy and agricultural policy? It remains to be seen whether a new public policy of similar importance to other policies such as social policy, agricultural policy and so on has already been put in place and has become firmly established, with its own objectives, instruments and evaluation tools.

In retrospect, it is remarkable that so little attention has been paid to this issue by social scientists in the disciplines of economics and political science. Moreover, it is also remarkable to see the major development in collaboration between the academic world, social economy actors and those in charge of public administrations, from the perspective of action research and partnership research. Knowledge on social economy policies has been driven by practitioners and by the academic pursuit of usefulness for political practice. Notable advances in this field have come more from *participatory and partnership research* than from strictly academic research. It has often been the actors in public administrations and organisations representing the social economy that have produced many of the publications on this topic, which has defined their eminently practical nature⁴. There are few systematic and rigorous scientific documents on the subject that serve as a guide for actors.

Social economy policy presents risks and vulnerabilities, including: (1) not translating from political discourse to facts (i.e., remaining a *sleeping beauty* without ever becoming a reality); (2) having a transformative capacity that does not materialise or is not adequately visualised and instead entering into processes of instrumentalisation by governments (i.e. processes of institutional isomorphism, with social economy entities being used and instrumentalised by public administrations); (3) having its continuity affected not only by political changes but also by the application of policies that come from outside and that are directly contrary to

4. The following manuals and practical guides on social economy policies should be highlighted: CIRIEC/EESC (2018); Garcia-Jane, Jordi (2015); GECES (2016); Jenkins et al (2021); OECD and European Commission (2017). *Boosting Social Enterprise Development: Good Practice Compendium*. Paris: OECD Publishing; OECD and European Commission (2020). *Assess your social entrepreneurship ecosystem. The better entrepreneurship policy tool*. <https://betterentrepreneurship.eu/en/home>; UNRISD (United Nations Research Institute for Social Development) (2016). *Promoting Social and Solidarity Economy through Public Policy*. In: UNRISD Flagship Report. Geneva: UNRISD, 115-139. <http://www.unrisd.org/flagship2016-chapter4>

the social economy's development agenda, such as budgetary austerity policies or regressive policies in terms of social rights (Chaves & Savall, 2019).

One possible line of research for the future is to advance the differential analysis between first- and second-generation policies and their most characteristic factors. The current framework offers several comparative dimensions, but which are the most salient? Is it the contrast between sectorisation and cross-cutting policies? Is it the permanent presence of the social economy on the political agenda despite political changes? Or is it the existence of social economy policies and the dissemination of these social economy policies and their laws from the state to the regional and local levels?

One question that arises is which level of government is the most appropriate for deploying public policies to promote the social economy? Given the strong linkages and anchoring with the territory, part of the literature leans towards the local and regional level. It therefore considers integrating the territorial dimension in such policies and deploying them from the territory level to be crucial (Klein & Tremblay, 2013; Itçaina & Richez-Battesti, 2018; Jenkins et al., 2021; Fraisse et al., 2024). However, there is no consensus on this issue, with Catalá and Chaves (2022) arguing that various levels are relevant, depending on their functionality in the overall policy, and that multilevel coordination between local, regional, national and supranational governments ensures alignment between strategic objectives and specific needs. In contrast, other literature insists on the importance of intermediate meso-economic spaces for dialogue, exchange, confrontation and construction of these policies (*espace publique mésoéconomique*, Laville et al., 2005), with these spaces emerging at different levels of government.

5. Future avenues for research

The present literature review on social economy policies identifies several priority areas for future research. First, there needs to be deeper analysis of the conditions that are necessary for governments to activate these policies, considering political, institutional and cultural factors. Second, more international comparative empirical studies are needed to address both national contexts with low levels of social economy development and those with advanced levels of development and comprehensive and effective promotion policies. Third, institutional adequacy, in the sense of how these policies are integrated into existing government structures and are connected to existing administrative dynamics, is another key line of study. In this context, the partisan dimension, political alternation and the profile of policymakers are also aspects to be investigated. They are often implicit and are not always taken into account in the emergence and development of social economy policies. The social economy can remain a politically divisive issue, with varying degrees of visibility in political party platforms (Abhervé, 2024). Fourth, it is necessary to advance in research on the evaluation of these policies, considering new metrics for measuring the effectiveness of different instruments and the general implementation of this policy. Also, allocations for the social economy beyond policy plans and instruments should be further investigated. In particular, it is important to study how budget-

ary resources are distributed between sectoral and cross-cutting policies, as well as between the state and local governments. Finally, the sustainability of these policies constitutes another central line of research, requiring studies that analyse how to maintain these policies while overcoming the risks derived from political, financial or other types of fluctuations.

6. Conclusions

The analysis of the literature on social economy policies reveals significant advances in establishing these policies as a field of government and academic intervention. Policies have evolved from sectoral approaches to cross-cutting and transformative policies. This paradigm shift has made it possible to incorporate the social economy as a strategic axis in various government and international agendas, highlighting its multifunctional potential to generate inclusive prosperity. However, important challenges remain, such as overcoming conceptual and operational fragmentation, integrating the social economy into traditional government structures and developing more sophisticated evaluation indicators that reflect its complexity and scope. Moreover, the sustainability and effectiveness of these policies depend on multiple factors, such as strong political leadership, participatory governance and the institutionalisation of appropriate policy frameworks. Associated risks, such as instrumentalisation of the social economy for government interests or a lack of continuity in the face of political changes, underline the importance of building broad and resilient coalitions between public and private actors.

Research on social economy policy, despite being well established in some respects, still lacks the recognition received by research on other government policies, in both academic and political spheres. The advances in research have been mainly driven by action research and partnership research, rather than strictly academic research. Such research shows that these social economy policies face multiple risks such as government instrumentalisation (institutional isomorphism), sustainability problems and vulnerability to adverse external policies. It also raises key issues such as deciding on the relevant level of government to deploy them and the importance of spaces for dialogue and deliberation, generally located at meso-economic levels.

Finally, based on this literature review, several priority areas for future research are proposed: first, to continue analysing the political, institutional and cultural conditions necessary for social economy policy implementation; second, to conduct more international comparative empirical studies comparing territories with different levels of development of the social economy; third, to analyse the integration of social economy policies into government structures; fourth, to advance in evaluation techniques adapted to the idiosyncrasies of these policies; and finally, to advance in the analysis of the factors that favour or hinder the long-term sustainability of social economy policies.

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