**From distant neighbours to bedmates: Exploring the synergies between the social economy and sustainable development**

**Abstract**

To introduce this special issue we explore the conceptual and practical synergies between the social economy and sustainable development. New empirical evidence is presented on the emergence of these two research fields and the increasing combination of these fields in the literature. Several avenues through which social enterprises can contribute to the transition towards sustainable development are then identified. This is followed by a discussion of how and why the combination can be particularly fruitful both for the social economy and for sustainability transition movements. We also highlight some important challenges facing the social economy with regard to its contribution to sustainable development. Finally we introduce the papers that constitute this special issue and show how they contribute, individually and collectively, to a better understanding of the increasing linkage between the social economy and sustainable development.

1. **Introduction**

The social economy consists of organizations that put the pursuit of social aims at the heart of their economic activity (Chavez & Monzón Campos 2007; Defourny & Develtere 1999; Defourny & Laville 2007). These organizations can be referred to as “social enterprises”, which, despite slightly different emphases in the literature, correspond to the set of organizations belonging to the social economy (Defourny 2001; Defourny & Nyssens 2013). As this paper will describe, social enterprises are committed to social or environmental missions directly related to the vision of sustainable development. In consequence, sustainable development is a natural ambition for social enterprises, which naturally tend to embrace a holistic approach to social change. The transition towards sustainability seeks to bring the economic system and society as a whole towards a new equilibrium that is environmentally, socially and economically sustainable (Khan 1995; Loorbach 2010; World Commission on Environment and Development 1987).

While the two sectors and scientific communities share many values, they have long co-existed in parallel, with relatively few connections. Social economy/enterprise and sustainable development are indeed distinct concepts dealing with different levels of analysis and different emphases: socio-economic for the former and environmental for the latter. Scholars working on social enterprise and the social economy do not frequently meet or interact with their peers specialized in sustainable development.

Nevertheless, the principles and values embedded in these two notions partly overlap, highlighting the need to consider and improve the economic, social and environmental sustainability of business activities (Cretieneau 2010; Seelos & Mair 2004). In other words, both notions emphasize the need for the economic system to engage in a transition process that is oriented towards human well-being and sustainability.

To a large extent, the two scientific communities are no longer isolated from each other, and an increasing number of connections are being established between these fields. This special issue is an example of a concrete outcome of such connections. In recent years, social economy and social enterprise scholars, for example at the Ciriec and EMES research networks, have shown increasing willingness to examine the contributions made by their own organizations and sectors to the broader themes of sustainable development and sustainability transition. At the most recent research conferences of these two networks, in 2015 (Ciriec in Lisbon and EMES in Helsinki), a specific sub-theme was devoted to sustainable development. In addition, scholars working on sustainable development and transition themes have paid increasing interest to social innovation and to alternative types of organizations––such as those of the social economy––as ideal vehicles for bottom-up transition initiatives. For example, at the latest interdisciplinary conference on sustainable development (CIDD, Brussels and Louvain-la-Neuve, Belgium, 2015), the social economy was at the centre of a specific sub-theme. This special issue gathers, but is not limited to, articles whose early versions were presented at Ciriec, EMES and CIDD conferences.

The synergy observed in research also holds for the practices of social enterprises. Convergence is even more salient in this respect, as more recent conceptions of sustainable development highlight the interconnections between environmental and social issues. It is now widely accepted that sustainable development means much more than solely complying with the environmental bottom line. For example, the combination of social and environmental objectives is emphasized in the Sustainable Development Goals voted at the United Nations General Assembly in 2015. Social enterprises are increasingly conscious of the interest, if not sometimes the need, to orient their activity more explicitly within the framework of sustainable development. On the one hand, the transition towards sustainable development can enrich the scope of societal aims of the social economy and integrate the actions of social enterprises into a long-term societal transition project (Cretieneau 2010; Seyfang & Haxeltine 2012). On the other hand, the way in which social enterprises manage the combination of economic, social and—increasingly—environmental dimensions can enrich sustainable development through concrete organizational solutions that differ significantly from those that have led to economic, social, environmental, ethical and other crises, both currently and in the past (Lévesque 2002; Seelos & Mair 2004).

In this introduction to the special issue, we suggest different ways in which social enterprises can contribute to a more sustainable system, and examine how and why this combination can be particularly fruitful, both for the social economy and for the sustainable development/sustainability transition movement. The remainder of the paper is structured as follows. First, we present new empirical evidence on the emergence of these two fields and their increasing combination in the literature. We then suggest different ways in which social enterprises can contribute to the transition towards sustainable development. In the next section, we discuss some challenges facing the social economy to contribute to the transition towards sustainable development. Finally, the last section introduces the papers that constitute this special issue and shows how they contribute, individually and collectively, to a better understanding of the increasing linkage between the social economy and sustainable development.

1. **Research on sustainable development and the social economy: a quantitative analysis**

Research on sustainable development and the social economy/social enterprise has expanded over the last two decades due to the emerging prominence of, and interest in, these two domains. A search of the contents of titles, keywords and abstracts of research papers identified an impressive 499,966 items for the terms “social economy” or “social enterprise” in WorldCat[[1]](#footnote-1) between 1994 and 2015 (See Figure 1). Moreover, the number of items was multiplied by six between 1996 and 2015, from 6,222 in 1996 to 53,265 in 2015. Analyzing the occurrence of the term “sustainable development”, we find a similar pattern: a five-fold increase between 1996 and 2015, to 79,864 items. This result clearly reflects the growing interest in these topics.

Going a step further, it is relevant to examine the number of publications at the intersection of these different fields, meaning publications that address both sustainable development and “social economy” or “social enterprise”. An average of 13% of the publications on the latter two categories included the term “sustainable development”. Moreover, this percentage has increased from 6% in 1996 to 17% in 2015, which supports our statement on the growing number of connections being established between these fields.

**Insert Figure 1**

1. **The contribution of the social economy to the transition towards sustainable development**

There are many ways in which social enterprises, and the social economy as a whole, contribute to the transition towards sustainable development. Without seeking to be exhaustive, we will highlight six key elements.

First, the social economy clearly contributes to fulfilling the goals or ambitions of sustainable development. The social mission that is central in social enterprises and often reflected in their micro-level practices is often aligned on societal challenges at the core of the vision of sustainable development (Huybrechts 2013; Nyssens 2006). Moreover, social economy organizations contribute to a bottom-up approach to sustainable development. This is because they often experiment with grassroots innovations responding to local social or environmental issues, taking into consideration the interests and values of local communities (Barth *et al.* 2015; Seyfang & Haxeltine 2012).

For instance, cooperatives of citizens producing and/or supplying renewable energy have developed local solutions and, by replicating and networking numerous initiatives, contributed towards an energy transition involving citizens and communities (Bauwens *et al.* 2016; Huybrechts & Mertens 2014). Similar initiatives have been developed around sustainable food, in particular short supply chains (Chiffoleau & Prévost 2012; Lockie 2009), and in other environment-related sectors such as recycling (Curtis 2005). But the environmental dimension can also be added to an originally social focus. In the case of social enterprises specialized in work integration (see Pel & Bauler 2017 in this special issue), activities such as house refurbishing or gardening have tended to increasingly take the environmental dimension into account, for example through ecological insulation or organic production. In fair trade, the focus on a fair price and decent working conditions for producers has been logically extended to an environment-friendly—and thus human-friendly—production process (Huybrechts *et al.* forthcoming; Renard 2010). And an increasing number of microfinance institutions offer green microcredits to support micro-entrepreneurs in their environmentally-friendly projects (Allet & Hudon 2015; Forcella & Hudon 2016).

Second, the specific organizational set-up of the social economy is often considered, by nature, as a more sustainable form of business enabling to address the social bottom line of sustainable development (Wanyama 2014) and to involve multiple stakeholders (Huybrechts *et al.* 2014). Social enterprises, particularly cooperatives and community-based organizations, are characterized by democratic and participative governance processes (Jaumier forthcoming; Mori 2014; Spear *et al.* 2009). In the practice of social enterprises, democracy and participation are implemented to empower stakeholders that are not traditionally given a voice in the shaping of organizations and supply chains (Tremblay & Gutberlet 2012). Empowering stakeholders is a major avenue towards social justice and social change (Phills *et al.* 2008). Participatory governance also helps to increase the well-being of and social capital among members, as two papers in this special issue show in the case of renewable energy cooperatives (Bauwens & Defourny 2017; Brummer *et al.* 2017).

Third, sustainable development is about pursuing social and environmental goals within the context of an economically sustainable project. Through their multi-objective and multi-stakeholder structure, social enterprises are particularly well equipped to combine these three objectives, as documented by several authors (Campi *et al.* 2006; Curtis 2005; Do Carmo & de Oliveira 2010; Huybrechts *et al.* 2014). The way in which social enterprises, as “hybrid” organizations (Battilana & Lee 2014; Doherty *et al.* 2014), manage the combination of economic, social and—increasingly—environmental dimensions, can enrich sustainable development through concrete organizational solutions that differ significantly from those that have led to various types of crises, both currently and in the past (Seelos & Mair 2004). Social enterprises have developed new structures to pursue social or environmental objectives under the constraint of financial sustainability (Battilana & Dorado 2010), designing and implementing sustainable business models likely to inspire other economic actors keen to participate in the sustainability transition (Loorbach *et al.* 2010; Vickers & Lyon 2012).

Fourth, the increasing role of the social economy in sustainable development contributes to emphasizing the social dimension of environmental problems, which has long been underestimated. It is, for instance, impossible to curb global energy consumption without understanding the underlying motives and social reasons behind inefficient energy behaviours (Sioshansi 2013). Moreover, many of the drivers of environmental problems are social or political (Eloi & Pochet 2015). It is therefore important to think about new forms or organizational structures, such as cooperatives, to address environmental issues in a socially desirable way (Bauwens *et al.* 2016; Huybrechts & Mertens 2014). Because social enterprises are not constrained by profit maximization and can experiment with innovative organizational practices, they can more easily avoid the trade-offs between social and environmental performance—or at least better deal with them more efficiently (Battilana *et al.* 2015; Smith *et al.* 2013). As mission-based organizations, social enterprises can voluntarily integrate an environmental dimension of sustainability into their mission and their accountability. This environmental mission enrichment is also encouraged by stakeholders such as social investors or donors (Nicholls 2010), consumers (Becchetti & Rosati 2007) and public authorities (Laville *et al.* 2006), all of whom develop an interest in all aspects—economic, social and environmental—of social enterprise performance.

Fifth, the participative methods and collective decision-making arrangements applied in many social enterprises have affinities with Ostrom’s design principles of successful self-governed common goods organizations. Ostrom (1990) explains that organizations successfully managing common goods such as forests share eight design principles, some related to collective arrangements and participative governance. To manage these common goods in a sustainable way, common rules—including those on decision-making—must be conceived of from the bottom up (Hollard & Sene 2010). The principles and functioning proposed by Ostrom clearly echo the foundations and practices of the social economy (Nyssens & Petrella 2015). Social enterprises could thus be potentially selected as example of organizations where these deliberations take place (Hudon & Meyer 2016), although they do not necessarily fulfil all of Ostrom's design principles.

Finally, at a more systemic level, the transition towards a more sustainable society requires global efforts, including large-scale citizen awareness (Geels 2002; Loorbach 2010). In this context, the participative social movements backing the social economy—for instance, cause-related initiatives such as the trade justice, women empowerment and fiscal justice movements—are particularly useful (Barrientos *et al.* 2007; Schneiberg 2013). The broader societal anchorage of several parts of the social economy, for example through the mutualist and cooperative movements, can easily serve as tools to raise awareness of sustainable development issues (Birchall 1997; Wanyama 2014). Hence, with regard to sustainable development, the social economy contributes not only through economic experimentation with sustainable practices (Seyfang & Haxeltine 2012; Vickers & Lyon 2012), but also through macro-level advocacy for a more sustainable society (Schneiberg *et al.* 2008; Tremblay 2010).

1. **A sustainability-oriented social economy: the road ahead**

We have identified several ways in which social enterprises, and the social economy as a whole, can contribute to the transition towards sustainable development. Nevertheless, there are several important challenges facing social enterprises with regard to this contribution. We focus on two main challenges: scaling and long-term sustainability.

The first challenge is related to the sustainability of social enterprises. These organizations face the challenge of reaching financial sustainability in the long term. For social enterprises that rely on subsidies (Battilana *et al.* 2012; D’Espallier *et al.* 2013), that dependence may become problematic amid a continuous decline in public support or donations. Indeed, while action for sustainable development may be encouraged at the outset through subsidies, revenue diversification is crucial for longer-term financial sustainability (Mertens 2010). In this context, the percentage of revenues derived from trading activities has increased in many social enterprises (Dart 2004; Haugh 2009). These organizations face the challenge of developing a sustainable business model that does not rely on one main client or funder, and that does not compromise the primacy of the social mission (Battilana & Lee 2014; Ebrahim *et al.* 2014; Mersland & Strøm 2010).

The second challenge is related to the scaling of social enterprises amid pressing global needs. Many social enterprises are still limited in terms of outreach or find it hard to replicate their model. Scaling up is clearly an important bottleneck for social enterprises (Bloom & Chatterji 2009; Lyon & Fernandez 2012; Vickers & Lyon 2012) and more generally for “social innovation” (Chowdhury & Santos 2010; Davies & Simon 2013). As explained by Chowdhury and Santos (2010, 147), “entrepreneurs who choose to scale social impact are faced with limits to organizational growth such as scarce resources or decreasing returns to scale”. The financial expectations of traditional investors (Nicholls 2010) make it harder for social enterprises to tap financial markets and obtain additional resources to upscale.

Another key reason why some social economy organizations may not find it easy to grow or upscale is related to one of the specific features (and the potential comparative advantage) of social economy organizations: their participatory governance. This is harder to maintain when the organization grows (Bauwens *et al.* 2016; Huybrechts *et al.* 2014; Jaumier forthcoming; Tremblay & Gutberlet 2012). For instance, credit cooperatives spreading in many rural areas in Western Africa started to organize dozens of general assemblies, causing administrative burdens and, in some cases, inconsistent decisions. Studies on European cooperatives that have expanded substantially also report similar growth-related governance issues (Bakaikoa *et al.* 2004).

The challenge for social enterprises is thus to maintain the participatory, multi-stakeholder dynamics that form their added-value, while being able to grow in order to deal with the societal challenges they intend to address (Jaumier forthcoming; Mori 2014; Spear *et al.* 2009). These challenges are particularly important and pressing in the context of environmental issues such as climate change and biodiversity, the persistence of which might severely damage the functioning of the earth's systems (Steffen *et al.* 2015). Therefore, new avenues to scaling that extend beyond mere organizational growth, and thereby protect participation and democracy, are particularly useful (Vickers & Lyon 2012). Social enterprises experiment with such scaling avenues with a sustainable development objective through a variety of strategies including replication (Blundel & Lyon 2014; Vickers & Lyon 2012), socially entrepreneurial networking (Davies 2009; Huybrechts 2010; Picciotti 2017; Yujuico 2008), collaboration with governments under public policies (Laville *et al.* 2006; Mulgan 2006), and partnerships with businesses focused on sustainability (Di Domenico *et al.* 2009; Huybrechts *et al.* forthcoming).

1. **Presentation of the special issue**

This special issue explores the linkage between the social economy and sustainable development from different viewpoints in order to document the nature of such links and the issues involved. Different levels of analysis will be combined (organizational, inter-organizational, field, region) in various regions (Italy, Canada, Germany, Belgium) and fields of activity (social finance, renewable energy, recycling, etc.). Six papers shed light on different aspects of the contributions from, and the challenges for, the social economy with regard to sustainable development. It is important to remember that sustainable development is understood here with its economic, social and environmental components. Some papers are, obviously, more focused than others on certain dimensions. Nevertheless, each of them contributes a very useful piece to the broader puzzle of the links between sustainable development and the social economy.

First, it is not surprising that the first paper uses the common goods framework, given the growing interest in social enterprises as vehicles for the governance of these goods. The paper examines to what extent “cooperative finance” can be seen as a common good created by people through collective action. Périlleux and Nyssens show that while the boundaries between the nature and property regime of goods may be relatively clear for natural common goods, they appear much more interlinked for human-made goods, where commons are embedded in intergenerational reciprocity. The authors also recommend designing suitable legislation to protect these commons from isomorphism, privatization and destruction (Périlleux & Nyssens 2017).

The next two papers examine the challenges of cooperatives in a field closely related to sustainable development: renewable energy, in particular community-based renewable energy (Huybrechts & Mertens 2014). The first paper investigates the way in which renewable energy cooperatives deal with tensions between their different goals and stakeholders. Based on a qualitative study of cooperatives in Germany, Brummer, Herbes and Gericke show that conflict handling by members of the Executive Board, the Supervisory Board and the rank-and-file during the decision-making process ranges from highly cooperative to fully competitive. These styles tend to converge on collaborative outcomes, reflecting the members’ shared commitment to the cooperative principles of the enterprise (Brummer *et al.* 2017).

The second paper on community-based renewable energy cooperatives explores how they create social capital among their members. Bauwens and Defourny examine whether and how the type and level of social capital differ. They use a typical distinction in the social economy, i.e. between mutual benefit organizations, which essentially seek to meet their members’ needs, and public benefit organizations, which seek to enhance the well-being of a broader community or the society as a whole. The paper relies on an econometric analysis within two renewable energy cooperatives in Flanders that have divergent orientations toward mutual versus public benefit. The authors suggest that, compared with public benefit, a mutual benefit orientation is associated with lower social identification with the cooperative and weaker ties between members; and they propose a set of factors explaining these relationships (Bauwens & Defourny 2017).

The next two papers explore the ability of social economy organizations to engage in social innovation towards sustainability. The first of these innovation-related papers examines how social cooperatives are created to respond to the emergence of new societal needs related to sustainability. Examining Italian cases in the fields of renewable energy sources, tourism, and the use of assets confiscated from the mafia, Picciotti highlights the capabilities of social economy organizations to foster inter-organizational and inter-sectoral collaborative networks aimed at local development. These capabilities are analysed as innovative coordination mechanisms that involve interactions between resources of a public, market and community nature (Picciotti 2017).

In contrast with the work of Picciotti focusing on recent social cooperatives, the second innovation-related paper concentrates on mature social enterprises, in particular large established cooperatives. While these cooperatives are not traditionally considered as the most active drivers of innovation for sustainable development, Vézina, Ben Selma and Malo suggest, on the contrary, that they may act as catalysts for sustainable social change. Using a resource-based approach, the authors examine the creation of the Desjardins Environment Fund, the first environmental fund in Canada. Based on their case study, the authors document how large established cooperatives can use both their democratic decision-making capacity and their local, bottom-up organizational flexibility to find innovative answers to sustainability challenges. In brief, the authors suggest that the capacity of larger, mature organizations to engage in social and sustainable innovation should not be underestimated (Vézina *et al.* 2017).

The sixth and last paper, by Pel and Bauler, explores the convergences between the social economy and the sustainability transition framework in the case of work integration social enterprises (WISEs). The sustainability transition framework is useful to understand the diffusion and institutionalization trajectories of work integration as a social innovation that has the potential for “systemic change”. The case of WISEs in Flanders documents the dynamics of “innovation capture” by regime actors and contributes to a better understanding of sustainability transitions more generally (Pel & Bauler 2017).

In sum, the six papers all highlight the capacity of social enterprises to engage with sustainable development in an innovative way. They complete each other nicely in examining the emergence of social economy-based sustainability innovations (Picciotti, and Vézina, Ben Selma & Malo), their institutionalization (Bauler & Pel), “common good-oriented” governance process (Périlleux & Nyssens), involvement of users-members (Bauwens and Defourny), and capacity to deal with tensions (Brummer, Herbes & Gericke).

This special issue is a first attempt to explore the convergences between sustainable development and the social economy through a related set of papers. Obviously, it does not cover the full scope of the topic and leaves several questions unanswered. For example, complementing the work of Bauler and Pel, among others, to what extent are social enterprises capable of inspiring actors other than governments, typically for-profit businesses, to adopt their sustainability innovations without diluting their systemic change ambitions? Or, how does a sustainable development orientation shape the management practices of social enterprises beyond governance issues, for example financing and communication practices? And, in the context of the growing demand for societal accountability, how can social economy actors measure and report their contributions to sustainable development objectives? We hope that this special issue will make valuable contributions and pave the way for future research in this area.

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**Figure 1: Literature on social economy/enterprise and sustainable development**

1. Fouillet *et al*. (2013) conduct a similar comparison with all these search engines for the term “microfinance”; they show that, compared with other search engines such as REPEC, ISI Web of Science or EconLit, WorldCat is the most inclusive dataset to track all publications. [↑](#footnote-ref-1)