The Social Economy and Contemporary Challenges: Innovation and Sustainability

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Abstract: This article explores the relevance of the social economy in addressing contemporary challenges through innovative and sustainable practices, supported by public policies. The research investigates the management models that social and solidarity economy organizations (SSEOs) employ to respond to the challenges of innovation and sustainability. The study includes an in-depth analysis of diverse operational models and accomplishments across various cases, presenting evidence on how the sector adopts innovative and sustainable practices. The article scrutinizes essential characteristics of SSEOs, such as democratic governance, reinvestment of surpluses in social businesses based on innovation and entrepreneurship, and a strong community orientation. These characteristics are examined for their relevance in addressing issues like social inequalities, digital transformation, and climate change. Additionally, the research includes an examination of four diverse cases of SSEOs established in mainland Portugal. It reveals the wide range of activities and significant interactions that these organizations have with various stakeholders in different economic and social contexts, contributing to regional social innovation ecosystems. The empirical study, based on a descriptive case study methodology applied to multiple and heterogeneous cases (in terms of fields of intervention and scale of resources), demonstrates that sustainability has become a driver in the social economy, within a framework of democratic governance and community involvement. Moreover, the research fills a gap in empirical literature by providing strong evidence through real cases of collaborative social innovation, the integration of environmental, social, and governance practices, as well as financial and regulatory support from the state for the resilience of SSEOs. The social value of the research lies in its empirical contribution to demonstrating how social business is a crucial element for communities to address global challenges, promoting economic growth and employment, social justice, including the fight against poverty, and environmental sustainability.

Keywords: Social economy, Sustainability, Digitalization, Social innovation, Social entrepreneurship, Social innovation ecosystem

1. Introduction

The social economy is a vibrant and dynamic sector that is crucial in promoting sustainable development and addressing complex societal challenges. The European Economic and Social Committee (EESC) defines the social economy as "*the set of organisations that do not belong to the public sector, operate democratically with the members having equal rights and duties, and practise a particular regime of ownership and distribution of profits, employing the surpluses to expand the organisation and improve its services to its members and to society*." (EESC, 2012; p.14). Distinguished by its social objectives and democratic governance practices, the social (and solidarity) economy encompasses a diversity of organizations, including cooperatives, mutual societies, associations, and foundations. These organizations operate based on principles of solidarity, the primacy of people over capital, and the reinvestment of surpluses to achieve social goals (Defourny & Nyssens, 2010; Moulaert & Ailenei, 2005). While diverse in its forms and practices, the social economy shares a common goal of meeting social needs and promoting community well-being. It emerges as a key player, through social innovation, social business models, and the inclusive digital transition, to respond to contemporary challenges, such as social inequalities, population aging, technological unemployment, the dehumanization of interpersonal relationships, and environmental crises (World Economic Forum & Schwab Foundation, 2022).

In the current global context, marked by rapid technological and economic changes, the social economy offers innovative and sustainable solutions that reconcile economic development with social justice and environmental protection (Birchall, 2011; European Commission, 2021). According to the Council of the European Union (2023), the social economy has been instrumental in promoting sustainable development practices. Previously, the United Nations (2014) highlighted that the social economy plays a key role in accelerating progress on the Sustainable Development Goals.

This paper will investigate the relevance of the social economy (also including the solidarity economy) in addressing contemporary challenges through innovative and sustainable practices supported by public policies. Thus, the research issue is what governance models social and solidarity economy organizations employ to respond to the challenges of innovation and sustainability. Based on a literature review including scientific articles published very recently in journals indexed to Scopus and Web of Science, as well as documentation available on e-portals of relevant international organizations, and on original case studies, we present evidence on how such sector contributes to social cohesion, economic development and environmental sustainability.

The structure of the article is as follows. In section 2 a characterization of the social economy is carried out, with emphasis on the distinctive principles of this sector to the private sector. Section 3 explains the distinction between social innovation and social entrepreneurship and their interconnection through the so-called social innovation ecosystem concept. Section 4 presents the case study including the explanation of research methodology, followed by characterization of the analysed cases of social and solidarity economy organizations. Section 5 provides evidence of cases' common practices and challenges regarding models of governance, communication with stakeholders, financial stability measures, social innovation projects, and environmental sustainability projects. Conclusions are presented in Section 6.

2. Characteristics of Social Economy Organizations

As stated by prominent authors (Defourny & Nyssens, 2017 and 2010; Defourny & Develtere, 1999) social and solidarity economy organizations (SSEOs) operate on principles that prioritize community well-being, social justice, and environmental sustainability. The main characteristics that define this sector include the primacy of social objectives; democratic governance; reinvestment of surpluses; autonomy and independence; solidarity and mutuality; and community orientation. By analysing shortly each of these characteristics, through theoretical insights, we will address the statement that SSEOs prioritize the creation of social value over financial profits, addressing issues such as poverty, unemployment, and social exclusion. This feature is key to differentiating the SSE from the business sector.

2.1 Primacy of Social Objectives

The social economy stands out for its emphasis on social objectives, contrasting with traditional economic models which primarily focus on financial profits (Defourny & Nyssens, 2010 and 2017; Utting, 2023; Utting et al., 2015). As mentioned in the Introduction, the main concerns are the reduction of social inequalities, population aging, technological unemployment, the dehumanization of interpersonal relationships, and environmental crises (World Economic Forum & Schwab Foundation, 2022), amongst others.

2.2 Democratic Governance

Democratic governance is a central feature of SSEOs, and they are managed through participatory decision-making processes that guarantee the voice of all members (Yi et al., 2023). Cooperatives, for example, operate on the principle of "one member, one vote," regardless of the amount of capital invested. This democratic framework promotes inclusivity, accountability, and shared ownership, strengthening a sense of community and collective responsibility (Birchall, 2011). Recent studies also highlight the importance of democratic governance for innovation in emerging technologies, such as artificial intelligence, which can be used to optimize internal processes and increase member participation in decision-making (Gonzales, 2023). Junior (2023) explored the importance of democratic governance and stakeholder participation, concluding that inclusive governance structures make SSEOs more resilient and able to respond quickly to crises, promoting sustainable practices effectively.

2.3 Reinvestment of Surpluses

Any surplus generated by SSEOs is reinvested in the organization itself or used to achieve social objectives, rather than being distributed as dividends to shareholders (Defourny & Nyssens, 2010 and 2017; Utting et al., 2015). This reinvestment supports the sustainability and growth of the organization by increasing its ability to deliver social benefits. Borzaga & Becchetti (2010) state that the reinvestment of surpluses is an essential practice that allows social enterprises (part of SSEOs, as shown further) to constantly adapt and innovate, ensuring their continued relevance and impact. The reinvestment of surpluses is vital for the implementation of sustainable practices and the promotion of green initiatives within SSEOs, contributing to the mitigation of the effects of climate change and other threats associated with globalization (Katajamäki, 2023; Giagnocavo, 2023).

2.4 Autonomy and Independence

Although SSEOs often work in partnership with public authorities and private entities, they maintain a high degree of autonomy and independence. This independence is crucial to preserve its social mission and avoid undue external influences. Autonomy allows these organizations to innovate and respond effectively to the needs of their communities (Defourny & Develtere, 1999). Scholz (2016) also highlights the importance of independence for social innovation, especially in contexts where social needs are rapidly changing. Recent research emphasizes that organizational independence facilitates the adoption of emerging technologies, such as artificial intelligence (AI), which can be used to improve operational efficiency (Gonzales, 2023) and broaden the reach of social initiatives namely in the education sector (Clamp & Tapley, 2023).

2.5 Solidarity and Mutuality

Solidarity and mutuality are core values of the SSEOs. These operate on the principles of mutual support and cooperation, both among its members and with the wider community (Yi et al, 2023). Examples include mutual aid societies and cooperatives that provide support to members in times of need, fostering a culture of reciprocity and collective well-being. Moulaert & Ailenei (2005) emphasize that solidarity is not only a core value but also a practice that strengthens the resilience of communities in the face of economic and social crises. Recent studies suggest that solidarity and mutuality within SSEOs are crucial to addressing global challenges such as the COVID-19 pandemic, helping communities to recover faster and more equitably (Mullings & Otuomagie, 2023).

2.6 Community Orientation

A strong orientation towards community development is another defining feature of the social economy. SSEOs often emerge in response to local needs and priorities, and their activities are rooted in the context of the communities they serve. This local insertion allows SSE to effectively address specific social challenges and contribute to the resilience and vitality of communities (Monzón & Chaves, 2008). Quiroz-Niño and Murga-Menoyo (2017) discuss how the social economy contributes to sustainable development and the strengthening of local communities. These authors highlight that the community orientation of SSEOs is essential for building more cohesive and resilient societies, especially in times of crisis.

The main characteristics of the SSE are as follows: teamwork, cooperation, self-management, inclusion, democracy, the connection of production to a specific geographical area, the creation of conditions for improving quality of life, and the sustainable local development of people and communities.

2.7 Sustainability

Recent literature adds new key themes suggesting promising paths for the evolution and continuous impact of SSEOs, contributing decisively to the change of the economic paradigm based on social innovation, social entrepreneurship, and the digital transition. For instance, Utting et al. (2015) explored how the SSE is emerging as a new economic paradigm that challenges the traditional rules of the market economy under the capitalist economic system. The authors argue that SSEOs are key to promoting social justice and environmental sustainability, especially in contexts of economic crises and climate change. In their view, the integration of these two principles into the operations of such organizations contributes significantly to Sustainable Development Goals. Siddique et al. (2023) found that ethical banks often adopt cooperative organizational structures and participatory governance models that promote principles like democratic control, participation, and collaboration. These features enable ethical banks to develop innovative financial products and services that address emerging societal needs sustainably.

2.8 Digitalization

A remarkable new type of SSEO is the platform cooperative which has emerged side by side with the digitalization of markets and social businesses, especially since the occurrence COVID-19 pandemic. Scholz (2016) examined the role of platform cooperatives in the digital economy. This author argues that these new forms of cooperatives can democratize the digital economy, offering an alternative to the traditional corporate model that dominates the sector. The author highlights that autonomy and democratic governance are essential for the success of platform cooperatives, allowing them to respond flexibly and effectively to the needs of their members.

By econometrically analysing the theoretically positive correlation between technological innovation and economic growth, in the light of neoclassical and endogenous economic growth models, Gonzales (2023) finds evidence in favour of using AI as a proxy for technological innovation. The author's interpretation is that AI helps in production, marketing, and customer acquisition for companies (and organizations, *in latu sensu*), increasing their productivity and consumer reach. In addition, other effects of AI include improved quality of services, increased accuracy and efficiency in work, and increased customer satisfaction.

3. Social Innovation and Social Entrepreneurship

Social innovation and social entrepreneurship are two distinct yet interconnected concepts that aim to address complex social problems and promote sustainable development. Social innovation involves creating new ideas, products, services, or models that are effective in improving living conditions and promoting social well-being (Coronel-Pango et al., 2023; Adro & Fernandes, 2021). Social entrepreneurship, on the other hand, utilizes entrepreneurial methods to solve social problems by combining a social mission with business strategies (Sottini et al., 2024).

3.1 Similarities and Differences

Both social innovation and social entrepreneurship recognize the importance of stakeholder collaboration and participation in achieving meaningful and sustainable results (Coronel-Pango et al., 2023; Adro & Fernandes, 2021; Crupi et al., 2023). However, social innovation is a broader concept that encompasses various activities and actors, while social entrepreneurship is more specific, focusing on applying business strategies to solve social problems (Sottini et al., 2024; Adro & Fernandes, 2021). Another significant difference lies in the approach to finance and sustainability. Social innovation initiatives can be funded through various sources, such as grants, government funding, crowdfunding, and social investment, with their sustainability often depending on their ability to generate continuous social impact (Global Innovation Fund, 2024). Social entrepreneurs, on the other hand, seek financially sustainable business models that generate revenue to reinvest in their social mission and expand their impact (Sottini et al., 2024).

Social innovation and entrepreneurship emerge as central themes in sustainable development and solving complex social problems. These concepts often intertwine, providing new approaches to social and economic challenges, and promoting social cohesion and community development. In recent years, the intersection between these fields has gained prominence in academic literature and regional development policies (European Parliament, 2021). This reflects a growing awareness of the need for integrated strategies that promote economic growth and respond effectively to social needs (Sottini et al., 2024). These strategies involve co-creation aiming to invest in evidence-based, accessible, affordable, and scalable new solutions (NESTA, 2015).

3.2 Social Innovation Ecosystem

Collaboration between different sectors – public, private, and SSEOs – is essential for the success of initiatives mentioned in the previous section, fostering a robust and resilient social innovation ecosystem (Abdi et al., 2024). This is characterized by the participation of diverse actors, including non-profit organizations, social enterprises, governments, and local communities aiming at innovation in different dimensions, such as environmental sustainability, social inclusion, and economic justice (OECD, 2021).

Another important aspect is the role of public policies and funding in supporting social innovation. Financing programs, tax incentives, and public-private partnerships are some of the strategies used to foster the development of financially sustainable business models, using revenues generated by their activities to reinvest in the social mission and expand their impact (Sottini et al., 2024). The successful implementation of these policies can significantly accelerate the uptake and impact of social innovation and social entrepreneurship, fertilizing and densifying regional social innovation ecosystems and thus contributing to building fairer and more equitable societies.

4. Case Study

4.1 Research Methodology

The present research used a descriptive case study methodology (Yin, 2018; Stake, 1995) to explore and describe in depth the characteristics and contexts of specific SSEOs. This methodology involves detailed collection and analysis of data from multiple sources, providing a holistic view of the phenomena under analysis.

Semi-structured interviews were carried out between April and May 2024 having been selected as interviewed people playing strategic roles within the organizations investigated, accumulating extensive experience at the top and mid-levels of management. Besides the interviews, the data collection process also involved consultation of available reports and accounts, and direct observation, including visits to the respective infrastructures. This approach ensured rich and contextualized data collection, which is essential for in-depth analysis of heterogeneous cases of SSEOs.

4.2 Sample Data Collection

This section presents collected data on a small sample of prominent Social and Solidarity Economy Organizations (SSEOs) dedicated to various social causes and located across different regions of Portugal. The coverage spans the entire country, from the northern to the southern regions, as well as from coastal areas to the interior.

Organization 1 is a non-governmental and private institution of social solidarity located in the NUTS3 region of Metropolitan Area of Lisboa, with approximately 60 years of existence. With about 160 employees, its mission is to support and care for children and young people in vulnerable situations, promoting a family environment that fosters their development and autonomy. Its values include solidarity, respect, and dignity. The organization operates through self-sufficient communities known as "villages," where children are cared for by dedicated ladies. It maintains close relationships with donors, volunteers, and the local community. The funding sources include state subsidies (33%), donations from individuals and companies (53%), and property and financial revenues (14%), with a total revenue of approximately €6,147,000 and a net profit of around €572,000. The challenges faced include efficient communication, maintaining operational quality and credibility, and ensuring continuous funding. In terms of social impact, the organization supported over 400 children and young people in 2023, and its awareness campaigns reached more than 10,000 people. However, it does not have any environmental sustainability projects.

Organization 2 is a non-profit social solidarity association located in the NUTS3 region of Baixo Alentejo, with approximately 25 years of existence. It has about 70 employees and aims to intervene in therapy with at-risk adolescents, promoting their social reintegration. Its values include empathy, change, and trust. The organization operates therapeutic centers offering psychology, occupational therapy, and social support services, in collaboration with schools, health services, and community organizations. Its funding sources include the Portuguese Ministry of Health, user contributions, and Social Security support. The challenges include overcoming the social stigma associated with addictions, securing public funding, and ensuring service continuity with limited resources. In terms of social impact, the organization served over 300 at-risk adolescents in 2023, with a 70% success rate in school reintegration and improved mental health indicators. It does not have any environmental sustainability projects.

Organization 3 is a civic non-profit association, a private institution of social solidarity, and a non-governmental development organization (NGDO) located in the NUTS3 region of Metropolitan Area of Lisbon, with approximately 20 years of existence. With about 40 employees, the organization promotes human dignity and social innovation, focusing on education and sustainable community development. It operates programs spanning education, social inclusion, and sustainable development. Its funding sources include European funds, local authorities, foundations, and private donations, with a total income of approximately €3,168,000 and a net profit of around €475,000. The challenges include ensuring long-term financial sustainability and balancing employee workload. In terms of social impact, the organization implemented over 20 community projects in 2023, impacting around 5,000 people. It promotes sustainability through the *Ubuntu in the Neighborhood* Project.

Organization 4 is a private institution of social solidarity located in the NUTS3 region of Ave, with approximately 45 years of existence. With about 90 employees, its mission is to promote social inclusion through art and culture. Its values include creativity, community participation, and cultural innovation. The organization operates programs including theatrical performances, workshops, and educational activities, in collaboration with schools, senior universities, cultural organizations, municipalities, and the local community. Its funding sources include public funds, private sponsorships, ticket sales, and partnerships. The challenges include securing continuous funding, managing limited human resources, and adapting programs to community needs. In terms of social impact, the organization had a positive impact on the development of educational, social, and artistic skills for all ages and developed various community programs, including elderly care and temporary reception centers. It promotes sustainable practices through the Eco-Schools project.

5. Results

The research reveals several common practices and challenges among the analysed Social and Solidarity Economy Organizations (SSEOs): active participation of members and partners in governance is a core practice, fostering transparency and accountability. Organizations demonstrate a strong alignment between their day-to-day activities and founding values, with empathy, change, trust, courage, commitment, and responsibility guiding internal practices and policies.

Clear and regular communication with stakeholders using traditional and digital channels is essential to maintain trust and support. Organizations monitor public opinion and provide whistleblowing channels and complaints books to promote customer, employee, and supplier satisfaction.

Diversification of funding sources is a common concern to ensure financial stability and continuity of missions, reducing over-dependence on public subsidies. Organizations seek financing through sales, service provision, and state support for social innovation and entrepreneurship projects. The centrality of values and mission in governance is evident, with organizations facing challenges such as social stigma, public disinvestment, and the need to maintain service quality with limited resources. Organizational resilience is strengthened through collaborative innovation practices. The analysed organizations have a significant social impact, benefiting thousands of individuals and communities through effective management practices, democratic governance, autonomy, and innovative approaches to address contemporary social challenges.

As a summary result the research fills a gap in empirical literature by showing strong evidence through real cases of collaborative social innovation, the integration of environmental, social, and governance practices, as well as financial and regulatory support from the state for the resilience of SSEOs. The social value of the research lies in the empirical contribution of social business as a crucial element for communities to address global challenges, promoting economic growth and employment, social justice, including the fight against poverty, and environmental sustainability.

6. Conclusions

The research shows that democratic governance, diverse funding, and effective communication are essential for the effectiveness and sustainability of the Social Economy. Public policies are crucial in supporting and promoting social economy activities, directly influencing the sector's sustainability and impact. SSEOs rely heavily on government subsidies and programs to run and expand their operations, which are essential for their maintenance and growth.

The resilience of the social economy sector is strengthened by financial and regulatory support from the government, as seen during the COVID-19 pandemic. Public policies also promote social innovation, enabling impactful projects on social inclusion and community development. Intersectoral collaboration facilitated by public policies is essential for the success of the social economy sector, as these policies promote partnerships and support networks, allowing the sector to innovate, grow, and adapt to contemporary challenges.

The combination of innovative and sustainable practices supported by public policies is key to addressing global challenges such as social inequalities, digital transformation, and climate change, promoting economic growth, social justice, and environmental sustainability.

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