

## **B.C.- Alberta Research Alliance on the Social Economy (BALTA)**

### **Annex A – Project C5-2007**

#### **A. Project Title**

**From Social Economy to Solidarity Economy: Changing Perspectives in a Volatile World (Phase One)**

#### **B. Brief description of project and project objectives, outputs and proposed outcomes**

This project focuses on examining the definition of social economy being used by BALTA and critiquing its conceptual capacity to effectively guide policy and practice in a volatile and rapidly changing global context. Describing some key elements of the context from which CED and the Social Economy have emerged over the last 30-50 years as a point of departure, the project will examine the Pearse definition being used by BALTA to guide its mapping work and offer an alternative formulation that cuts the conceptual cloth very differently. The resulting paper, to be done in April, will be used as a basis for consultation with selected practitioners and researchers in Canada and the United States. The results of the consultations will be documented by the beginning of July and be the basis for further work defined in phase two of this project (see Annex A – Project C6 -2007).

#### **Objectives**

1. To provide a brief overview of the evolution of the social economy and related fields (CED, economic democracy, co-operatives) in Canada and the U.S.
2. To present the definition of the social economy being used by BALTA.
3. To introduce and elaborate a conception of the solidarity economy which envisages a different conceptualization of the relationship to the public and private sectors.
4. To interview several active individuals in various aspects of the field through the Canadian CED Network and the North American Network on the Solidarity Economy (NANSE).

#### **Outputs**

1. A paper for debate in BALTA, the Canadian Social Economy Hub, and with a variety of networks in Canada, the U.S. and Europe.
2. An addendum documenting the results of structured reflections with selected members of CCEDNet and NANSE.
3. Academic and Practitioner publication products and web site postings.

#### **Outcomes**

1. The discussion and debate engendered by this work will provoke clarification of various perspectives existing in the field.
2. The practitioner and policy implications of cutting the conceptual cloth differently will initiate a critical discussion of the assumptions, strategies, targets and actors in the field.

**C. Purpose and significance of the study, including congruence of the proposed research with the over-all strategic research objectives identified for the SERC and BALTA**

The current conception of the social economy outlined by John Pearce and in use as a guide to mapping in the BALTA Alliance depicts the social economy as being one component in the “third system” or, put more commonly, civil society. John Restakis, in his paper related to defining the social economy, refers to the social economy in a way that is inclusive of most of what Pearce refers to as the third system, and similarly he depicts the private and public sectors as being separate spheres, although he clearly indicates that the boundaries are permeable.

This paper will use the current conception of the social economy depicted by Pearce and Restakis as a point of departure from which to formulate an alternate way of conceiving of the three sectors’ relationship with each other. In particular, the boundaries of the social and economic landscape within which action is conceived and planned will be challenged, provoking discussion relevant to the scope within which the central feature of the social economy - reciprocity – is applicable.

This paper may also facilitate some clarification of the relationship between CED, social enterprise and the social economy, a debate that has become somewhat contentious of late in Canadian networks (CCEDNet, Imagine Canada, CCA). The depiction of the solidarity economy could provide a measure of clarification, thus facilitating more strategic and operational collaboration between actors in these arenas.

**D. Will this project be led and managed by a SERC member or members or will it require a request for proposals?**

The project will be led by Mike Lewis in collaboration with Dan Swinney.

**E. Lead researcher, organization name and contact information (when known)**

Mike Lewis, Canadian Centre for Community Renewal,  
9777 B Somers Road, Port Alberni, BC, V9Y 8N9  
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**F. Names of other researchers and organizations involved (when known)**

As identified in the objectives, the paper will be used as a point of consultation with several people who are related to the Canadian CED Network and to the emerging network of NANSE. SERC 3 members requested that Mike Lewis identify targets for interviews in the annex. Other suggestions are welcome.

**Targeted Interviews in St. John’s, Newfoundland**

Yvon Porier – Quebec City – Labour and CED background – affiliated through GESQ (International Social Economy organization in Quebec) with NANSE  
Ethel Cote – francophone in Ontario, President of Ontario Social Economy Network and board member of CCEDNet

Dianne Kelderman – Executive Director of the Nova Scotia Co-operative Council, CCEDNet member and BALTA collaborator

Rankin McSween – Executive Director of New Dawn Enterprises – Sydney, Cape Breton, founding member of CCEDNet

Nancy Neamtan – President of the Chantier l'économie sociale in Quebec, Strategic Alliance partner of CCEDNet, collaborator of BALTA

Norman Greenberg – CCEDNet Policy Council, Nova Scotia

David LePage – Chair of Policy Council, ENP and collaborator in BALTA

#### **Other Canadian Interviews**

John Restakis – co-investigator BALTA and Executive Director of BCCA

Margie Mendell – Concordia , BALTA collaborator

#### **Targeted Interviews in Atlanta**

Cliff Rosenthal – President and CEO of the National Federation of Community Development Credit Unions ; New York City

Matt Hancock – Centre for Community and Labour Research – Chicago

Stewart Perry – CCCR, Centre for Community Enterprise, BALTA Collaborator

Chris Pinney - Director of Executive Education, Carroll School of Management, Boston

The balance of US interviews will be determined by Dan Swinney and be conducted in June during the US Social Forum where a number of people becoming engaged in NANSE will be present. There is also a chance that I will be with David Korten in May. No more than another 4 interviews will be undertaken for a total of 16.

Pat Conaty of the New Economics Foundation in Britain will also be interviewed. Pat is a collaborator in BALTA

This first probing of reactions to this conceptualization is deliberately targeting people who have a very real interest, knowledge and probably diverse and critical comments to make related to the conceptual framework introduced. Interviews will be documented for analytical purposes. Analysis will be reported in an addendum to the paper.

#### **G. Will the project involve hiring one or more student researchers? Will they need to be recruited or have they already been identified?**

No students will be hired.

#### **H. Brief description of project roles and responsibilities for project participants (lead researcher, other researchers, student researchers, partner organizations).**

Mike Lewis will have major responsibility for all aspects of the project. Dan will collaborate on reviews and the selection and recruitment of 4 US interviews.

## I. Indicative Budget

<b>Category</b>	<b>Requested of BALTA</b>	<b>Other Contributions</b>
Student salaries & benefits		
Researcher Release Time	4 days of salary replacement time already budgeted for Mike Lewis will be allocated to this project.	In kind from CCCR/CCCR 10 days = \$5,000 In Kind – Dan Swinney = \$1,000
Research Support Costs		
Knowledge Dissemination	Not sure at this point	
Travel	\$1,200 Atlanta travel costs - 4 days in June	\$1,500 St John's travel costs paid by CCCR and CCEDNet
<b>TOTALS</b>	<b>\$1,200 + replacement time</b>	<b>\$7,500</b>