

Expanded abstract

Social Economy: statistics, concepts, and scope – three decades towards international consensus

This research reviews the evolution over the past 35 years of scientific, social, and political literature focused on the challenges and difficulties that hinder the production of accurate, rigorous, and comparable statistics on the social economy (SE). Despite significant progress made in compiling such statistics in numerous countries, until very recently, there was no widely accepted definition of the SE that enjoyed broad scientific, political, and social consensus at the international level.

The study focuses on the evolution of the main theoretical approaches and the various ways the SE sector has been delineated, the statistical efforts made to measure it over the past 35 years, and the blurred boundaries that still surround the SE. It proposes action lines for developing harmonized SE statistics on a global scale.

Objectives

The main objective of this research is to analyze the global evolution over the last 35 years of statistical approaches aimed at quantifying the activity—in all its dimensions—of the different actors that make up the SE. This is done from an analytical perspective, focusing on the root causes of the challenges and difficulties in producing harmonized, accurate, rigorous, and comparable SE statistics. The ultimate goal is to find viable solutions to overcome these obstacles and effectively address the statistical challenges involved.

Methodology

Three core obstacles have hindered the development of harmonized international statistics on the SE during the period studied: a) The absence of a consensual and internationally accepted definition and delineation of the SE, both in academic literature and among SE actors and political institutions; b) The lack of recognition and self-identification of SE by its own actors; c) The invisibility of SE in international systems of national accounts (SNA-2008 and ESA-2010).

Accordingly, the research begins with a review of the evolution over the past 35 years of literature focused on the conceptualization and delineation of the SE and its various components, including: 1. The concept and delineation of SE based on its development through social actors, academic literature, and EU political institutions; 2. The concept and delineation of the nonprofit sector (NPS), based on the Johns Hopkins University (JHU) research project and the SNA-2008; 3. Social enterprises and the SE; 4. The international concept of the social-solidarity economy (SSE).

The study continues with an analysis of how national and international statistics on SE and the NPS have evolved over the last 35 years, concluding that the challenges in achieving harmonized and comparable statistics stem from the previously mentioned causes.

Conclusions

1. The first delineation of the SE was carried out in Europe by its own actors, based on the historical principles of cooperativism established as early as the 19th century.
2. The main reasons it has been difficult to produce harmonized international SE statistics include the lack of a consensual international definition, the absence of international self-identification by SE actors, and the SE's invisibility in global national accounting systems.
3. The conceptual and methodological divergences between SE and NPS frameworks indicate that the SE cannot be simply understood as an aggregate of the entities covered by both approaches.
4. Social enterprises considered part of the SE—according to both European continental literature and EU institutions—are only those that comply with the shared principles and core characteristics of the SE.
5. With the convergence of the European concept of SE and the ILO/UN concept of SSE, a unified and widely recognized international concept has emerged, supported by social actors, international institutions, and a broad segment of the academic community.
6. Advancing harmonized international statistics on SE requires that SE be recognized, defined, and delineated in the national accounting systems of both the United Nations and the European Union. This includes the development of a new Satellite Account Manual for the Social and Solidarity Economy.
7. National legislation and international policy guidelines must address and reduce the blurred boundaries of the SE. A key concern is the indiscriminate inclusion of all types of associations, foundations, and social enterprises, which may dilute the core identity of the SE.
8. Entities whose inclusion in the SE is uncertain or lacks consensus should be considered statistically using a modular system, allowing for separate identification and accounting.
9. The production of regular SE statistics on its enterprises and organizations requires collaboration between national statistical offices, representative SE organizations, and universities and specialized research centers.