



Social Enterprise in Québec: The Social Economy and the Social Enterprise Concepts

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PREFACE AND ACKNOWLEDGEMENTS

This paper is part of a series of Working Papers produced under the International Comparative Social Enterprise Models (ICSEM) Project.

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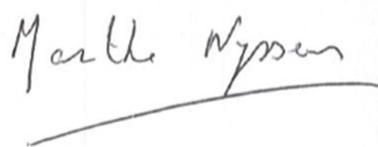
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First and foremost, the production of these Working Papers relies on the efforts and commitment of Local ICSEM Research Partners. They are also enriched through discussion in the framework of Local ICSEM Talks in various countries, Regional ICSEM Symposiums and Global Meetings held alongside EMES International Conferences on Social Enterprise. We are grateful to all those who contribute in a way or another to these various events and achievements of the Project.

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ABSTRACT

This article explores how the social enterprise concept is used in Québec. Focusing on the historical, institutional, and current conceptual understanding of the social economy in Québec, it explores the related definitions, terminology, and typologies currently in use. The term “social enterprise” is nearly absent in Québec, mainly due to the highly recognized notion of social economy. However, not all Québec enterprises that pursue social goals fit into the social economy institutional definition. This article proposes a conceptual framework for understanding the modalities of Québec’s field of social economy and other social purpose enterprises. It suggests that “social enterprises” in Québec are those that participate in the social purposes of the social economy without necessarily sharing the core and institutionalized characteristics of social economy enterprises.

Keywords: Social enterprise; Social economy; Conceptual framework; Quebec

INTRODUCTION

As part of the International Comparative Social Enterprise Models (ICSEM) research project led by researchers of the EMES International Research Network, this article explores how the social enterprise concept is used at present in Québec. The widespread concept in Québec is that of the social economy. Its definition, today institutionalized in a specific legislation, refers to the production of goods and services by nonprofit associations, mutual societies, and co-operatives, and to a set of guiding principles these organizations should follow. Focusing on the historical, institutional, and current conceptual understanding of the social economy in Québec, the article explores the related definitions, terminology, and typologies in usage at the present time.

The term “social enterprise” is nearly absent in Québec, mainly due to the highly recognized notion of social economy. However, not all of Québec enterprises related to the objectives of the social economy fit into the social economy institutional definition. Should these enterprises be named “social enterprises”? We explore this question by comparing the notion of social enterprise, as defined by EMES, to the Québec notion of social economy, and by examining more closely the characteristics of enterprises that pursue social goals in Québec.

Following the ICSEM project’s guidelines, this article is comprised of three sections. The first section presents the main historical, contextual, and conceptual features of social economy and social enterprises in Québec. The second section proposes a framework for classifying Québec’s social economy and related enterprises in three main categories. Finally, the third section describes these three categories, presenting some exemplary cases that illustrate the main characteristics of each.

1. HISTORICAL, CONTEXTUAL, AND CONCEPTUAL ANALYSIS OF SOCIAL ECONOMY AND SOCIAL ENTERPRISES IN QUÉBEC

1.1. Historical analysis of social economy in Québec

In Québec, the most widespread concept referring to so-called social enterprise is the social economy concept. Québec’s social economy has a long history that began in the nineteenth century and developed into five major periods and configurations (Lévesque 2013).

The first configuration corresponds to an urban solidarity economy, which manifested in the nineteenth century with the emergence of autonomous, self-managed, and non-market socioeconomic initiatives in response to the harsh conditions of life and work imposed by the progressive development of industrial and commercial capitalism (Lévesque 2013). Without significant support from social authorities, such as the church, the state, and traditional elites, these initiatives reconfigured as mutual societies.

The second configuration dates from the early twentieth century and corresponds to a rural, market-oriented social economy that was sponsored by social elites, the church, and public authorities. This period is characterized by the rise of large mutual societies, agricultural co-operatives, as well as savings and credit co-operatives.

The third configuration, ushered in by the economic crisis of 1930, represents the “golden age” of co-operatives and saw the emergence of co-operatives in new areas such as fishing, electricity consumption, and housing. Roughly during this time, namely between 1926 and 1956, the number of nonprofit associations also increased fivefold.

However, the momentum and power of these new co-operative sectors began to wane in the 1950s, slowly giving way to the fourth configuration of the 1960s, 1970s, and 1980s. This phase was initially characterized by the expansion of more mature co-operatives, during the years of the Quiet Revolution (1960–1970), which were marked by strong economic nationalism. Later, following the economic crisis of the early 1980s, it was characterized by the redirection of state support away from co-operatives and toward private companies, which were considered more likely to survive the impending restructuring of the economy. Still, co-operatives that had manifested a certain independence from state support continued to run their operations.

The fifth configuration took shape in the 1990s with the convergence between the social and solidarity economy and the state, in the context of a partnership regarding economic as well as social development. Co-operatives and associations developed initiatives as responses to the economic crisis and the crisis of the welfare state, providing solutions to the very concrete problems of long-term unemployment, social exclusion, new social needs, and social emergencies (Lévesque 2013).

Following this long process, the social economy concept finally gained institutional recognition in Québec in the mid-1990s (Lévesque 2013), namely as a result of the 1996 Summit on Economy and Employment. The definition of the social economy that is widely accepted to this day was originally produced by social economy actors (co-operatives, community-based nonprofit associations, community economic development organizations, etc.) within the Social Economy Working Group created by the Québec government, and that led to the constitution—and institutionalization—of the *Chantier de l'économie sociale* (in French, “chantier” means construction site, building or work under construction). In this definition, the social economy comprises the activities and organizations associated with collective enterprises that aim to serve their members or community, operate independently of government, incorporate democratic decision-making procedures into their by-laws and work processes, uphold the primacy of people and work over capital in the distribution of profits and revenues, and base their operations on the principle of participatory management, empowerment and individual and collective responsibility. Social economy finance institutions such as the Québec Social Investment Network (*Réseau d'investissement social du Québec*) and the *Caisse d'économie solidaire Desjardins* (a particular Desjardins credit union dedicated namely to the social economy) also contributed to putting this definition into practice throughout Québec. More recently, in October 2013, the Québec government officially recognized the social economy concept with the adoption of Bill 27, the Social Economy Act. This law is largely based on the social economy definition of 1996, yet provides a more comprehensive framework by legally institutionalizing the social economy field in the province. As stressed in the law, this framework law ensures recognition of social economy enterprises (co-operatives, mutual societies and non-profit organizations of a commercial nature) by all government departments and bodies.

1.2. Contextual analysis of the social economy in Québec

Québec's social economy is rich and diversified. We focus here on the main contextual elements that directly impact the definition and boundaries of the social economy field. These elements can be understood on the basis of three different sets of definitions and typologies: institutional, applied institutional, and analytical.

1.2.1. Institutional definition and typologies

The first level is the institutional definition brought by the Québec government's recognition of the social economy, followed by a legislation that offers a framework for the social economy based on legal status and overall principles. The Social Economy Act defines the social economy enterprise as "an enterprise whose activities consist, *inter alia*, in the commercialization or exchange of goods or services, and which is operated, in accordance with the principles set out in the first paragraph, by a co-operative, a mutual society or an association endowed with legal personality" (Québec 2013, Chapter I, Article 3, our translation). It also institutes the principles that are to guide these activities, featuring their social purpose, democratic governance, economic viability, and non-distribution or limited distribution of surplus as well as remaining assets in the event of dissolution. Co-operatives, credit unions, mutual societies, and nonprofit organizations are also each ruled by specific Québec legislations. For example, the Cooperatives' Act defines the co-operative principles (consistent with the International Cooperative Alliance's principles) and mentions special provisions for certain types of co-operatives: producers, farmers, consumers, housing, students, workers, workers shareholder, and solidarity co-operatives.

The institutional definition of the social economy in Québec does not include private foundations, hospitals, colleges, universities, or churches. It does not include either nonprofit organizations that do not follow the guiding principles of the social economy¹ and those that do not commercialize some of their products or services to clients or to a government agency or ministry. Thus, the term social economy in Québec somewhat covers what in France is called the "social and solidarity-based economy", with the exception of foundations, which are now considered to belong to the social economy in France but not (yet) in Québec (we will develop this matter further on in this article).

1.2.2. Applied-institutional typologies

The second level of typologies are the applied-institutional typologies, established first by social actors and taken on by public policies and through policy frameworks (such as government programs) that require some form of accreditation (formal public recognition), and are usually based on the nature of the organizations' activities and modes of production. In Québec, this may include work integration enterprises, domestic help social economy enterprises, and daycare centers, which can be incorporated as either nonprofit associations or co-operatives. The term "community economic development" refers to groups that foster local development in both economic and social dimensions—a reality that is also part of the social economy. Another institutional-applied typology is found in Québec's notions of "community action" and "autonomous community action" (ACA), which likewise overlap with

¹ The legal framework in which most non-profit organizations incorporate in Québec is very loose (Part 3 of the Companies' Act), and many of these organizations have nothing to do with social economy principles.

the notion of the social economy, although the ACA movement clearly wishes to distinguish itself from the social economy concept in that many of its activities are in no way commercial. As just mentioned, such terminology was established by social actors but has been adopted and institutionalized by public policies.

The government uses the more general terms of “collective entrepreneurship” and “collective enterprises”—as in the Infrastructure program in collective entrepreneurship (*Programme d’infrastructure en entrepreneuriat collectif*, or PIEC)—and the academic world uses them too. Québec practitioners largely accept these terms. For example, the Université du Québec à Montréal (UQAM) post-graduate management programs use the term “social and collective enterprises”. This term was chosen based on brainstorming sessions with practitioners coming from various horizons (charitable, non-governmental, community-based, or co-operative organizations), who clearly rejected the term “social enterprise” on the basis that it could introduce confusion about the collective nature of the social economy. McGill University, which recently received a donation to develop this field, likewise opted for the term “social economy” rather than “social enterprise”, arguing that “‘social economy’ is how it is called, here in Québec.”²

1.2.3. Analytical typologies

The third level comprises further analytical typologies. Proposed by various researchers, they are based on different attributes or characteristics of the organizations. Benoît Lévesque (2003) proposed a typology based on the nature of the needs (urgent needs or aspirations) and the dominant form of activity (market or non-market), resulting in four groups of social economy organizations. In another of his publications, Lévesque (2002) proposed a typology of forms of entrepreneurship differentiating between three groups: capitalist, social, and collective. The main difference between the last two groups is the nature of their activities, one being community based and the other collective based. Lévesque (2013) also proposed a typology that categorizes social economy enterprises into three groups according to their objectives, their methods of distribution of surplus, and their governance and representation body. Essentially, these three groups correspond to co-operatives and mutual societies; nonprofit co-operatives and associations; and unions’ funds. According to Lévesque, some charitable foundations could be considered as a fourth category; yet, as mentioned above, in Québec charitable foundations are not currently considered as part of the social economy. This could change in the near future, as public community-based charitable foundations are increasingly adopting social economy modes of functioning (Fontan et al. 2011; Gazzoli et al. 2014).

Focusing on the diversity of organizational forms found in a statistical study of Montréal social economy organizations, Rousselière and Bouchard (2011) noticed the existence of four transversal models. Each of these models combines, in recurring patterns, different variables that characterize social economy enterprises. These variables concern the hybridization of resources (public/private, market/non-market); the structure of labor (paid/volunteer workers); and the link, or lack thereof, of the social mission to the main economic activity (e.g., housing is both the social mission and the economic activity of co-operative housing organizations, whereas training is the social mission and, for example, woodwork is the economic activity of a work integration enterprise). In the data they analyzed, the financing of activities and the type of work were strongly correlated to a particular organizational model. Notwithstanding

² Professor Steve McGuire, in private conversation with author at the launch of the initiative.

their legal status (co-operative or nonprofit association), organizations in their study had a high probability of belonging to one of the following patterns of organizational features, or organizational models (Hannan & Freeman 1989): “volunteer” (10 volunteers or more, low number of wage employees, 50 percent or more of public financing), “professional” (10 or more full-time employees, 10 or more volunteers, 10 or more other employees with another status, 50 percent or more of public financing), “market” (50 percent or more of market revenues, 10 or more full-time employees and 10 or more other employees, low number or absence of volunteers), or “hybrid and emerging” (newly created, low number of wage employees, mixed sources of revenues).

Another typology, proposed by Bouchard et al. (2011), is based on a substantive definition of the economy (Polanyi 1944) that allows for the distinction of different types of resources mobilized by social economy organizations (monetary or non-monetary) as well as different mechanisms for allocating these resources. These mechanisms—namely market exchange, redistribution, and reciprocity (Laville 2007; Polanyi 1944)—are respectively regulated by market price, regulation (law/coercion), and obligation (Enjolras 2000). Based on this framework, the model put forward by Bouchard et al. classifies social economy enterprises by their dominant source of revenues (public or private) and resource allocation mechanism, distinguishing six models: (a) public/market (e.g., childcare services); (b) private/market (e.g., student co-operatives); (c) public/non-market (e.g., women’s shelters); (d) private/non-market (e.g., Amnesty International); (e) public/non-monetary (e.g., community recreation centers); and (f) private/non-monetary (e.g., local exchange trading systems).

Comeau et al. (2001) proposed a typology based on the case study framework of the Research Centre on Social Innovations (*Centre de recherche sur les innovations sociales*, or CRISES) (Comeau 1996). This typology combines the institutional dimensions (power structure, internal and external statutory rules) and the organizational dimensions (production, resources, and consumption) that constitute the CRISES conceptual framework to define six types of social and solidarity economy enterprises.

As there is no typology concerning the notion of “social enterprise” in Québec’s literature, a more detailed discussion about the “social enterprise” concept in Québec is presented in the next section of this article.

1.3. Conceptual analysis of the social economy and social enterprises in Québec

1.3.1. *The use of the social enterprise concept in Québec*

In Québec, the most commonly used term in this field is that of “social economy enterprises” (SEE), sometimes also called “collective enterprises”. It constitutes a unifying and inclusive concept (Lévesque 2013: 35) and is used at institutional, analytical, as well as practitioner levels. Thus, although researchers and social actors might use different terminologies, there is only one recognized institutional definition (Lévesque 2011). As mentioned above, consensus for the latter began forming in 1996 with the inception of the Québec Social Economy Working Group and has been consolidated since 2013 with the adoption of the Social Economy Act (Québec 2013).

In Canada, the use of the concepts of “social enterprise” and “social entrepreneurship” is relatively recent (Fontan 2011: 43) and varies from one province to the other (Mendell 2010: 243). According to Marguerite Mendell (2010: 251), despite Canada’s geographical proximity to the United States, “the culture of individualism that underlies social entrepreneurship” in the

US model is less present, and this constitutes an important and distinct feature of the social economy in Canada. In Québec, however, the term “social enterprise” is hardly ever used (Mendell 2010: 243)—at least by the French-speaking population (the majority in Québec). This is because the notion of social economy is predominant, used by most people, and strongly rooted in the associative and mutual movements of the nineteenth century (Lévesque 2013), in addition to having affinities with the Latin and French European social and solidarity economy concepts.

However, some organizations that appear to be participating in the social economy do not fit the institutional definition of social economy enterprises. These are mainly organizations that are not incorporated as a co-operative, association (nonprofit organization), or mutual society but are closely linked to the development of the social economy (e.g., organizations that have development funds for the social economy and sustainable development, but are governed with a shareholder structure). Some organizations might have practices that are similar to those of social economy organizations, but without sharing all their institutionalized characteristics (e.g., local exchange trading systems that have no monetary-based commercial activities). Thus, although such organizations are sometimes categorized as social enterprises (Mendell 2010), they are essentially “hybrids” (Spear 2011) or “uncertain components” (Desroche 1983) of the social economy as defined in Québec. We will go into more details about those further on in the article.

We also observe in Québec the penetration of related concepts. Enterprises that embrace “corporate social responsibility” and “sustainable development” objectives are becoming more overt about their distinctiveness. The B Corps certification is an example that takes the form of a label attributed to classic private for-profit corporations.³ The B Corps label certifies that enterprises meet standards of social and environmental performance and accountability and transparency, and vouches for these enterprises’ corporate social responsibility. These recent developments have brought the “social entrepreneurship” and “social enterprise” terms into Québec’s discussion about the social economy concept and related definitions. By and large, the terms are starting to emerge within the English-speaking population of Québec, but also in business schools and in large private foundations (e.g., the McConnell Foundation). However, some actors have also proactively worked for the introduction of these terms into the context of the province, especially in reference to new social and environmental mission-oriented ventures and to organizations based on either collective or individual forms of ownership.

The Institut du Nouveau Monde (INM) and Ashoka Canada are the two main civil organizations working for the promotion of these concepts in Québec. INM is a not-for-profit and non-partisan organization with a mission to encourage civic participation and the renewal of ideas in Québec. With regard to social entrepreneurship, INM has been developing different tools, like scholarships, training programs, and events catering to social entrepreneurs. Moreover, through its program *À go, on change le monde!*, INM also provides opportunities for young entrepreneurs. The vision of this program highlights “social enterprise” (*entreprise sociale*) as a means to “change the world”: “To offer young people who want to change the world the possibility to create a social enterprise to achieve this goal” (Institut du Nouveau Monde 2015, our translation). Largely inspired by Ashoka, INM has developed a definition that is “adapted to Québec’s reality” of what constitutes a social entrepreneur. According to INM, social entrepreneurs are people who:

³ See: <http://www.bcorporation.net/community/find-a-b-corp?search=Québec>.

identify issues or social needs; put forward a practical and innovative solution in order to promote change and social innovation; use entrepreneurial principles to create and manage an organization; demonstrate unquestionable ethics; work together and involve the community in the project; share experiences in order to promote the transfer of knowledge; demonstrate exemplary leadership; and implement a project with sustainable social benefits.

(Institut du Nouveau Monde 2015, our translation)

INM concludes that social entrepreneurship is part of the social and solidarity economy movement—the part of it that places projects, citizens, communities, and society at the very heart of the enterprise.

For its part, Ashoka is an international network of social entrepreneurs that “strives to shape a global, entrepreneurial, competitive citizen sector: one that allows social entrepreneurs to thrive and enables the world’s citizens to think and act as change makers” (Ashoka Canada 2015). Over the years, Ashoka has trained more than 2,700 fellows, 36 of whom are Canadian. Of those, 15 are from Québec, which represents nearly half of the Canadian nominations.

Attentive to these conceptual developments, some of the main organizations linked to Québec’s social economy, such as the Chantier de l’économie sociale and the liaison and transfer center “Innovative Territories in Social and Solidarity Economy” (*Territoires innovants en économie sociale et solidaire*, or TIESS), have recently expressed their interest in exploring, understanding, and clarifying the definitions as well as the particularities and issues concerning ideas related to “social entrepreneurship” and “social enterprise.” One of the first actions was the creation of a working group by TIESS in mid-December 2014 (Roy, forthcoming). The purpose of this working group was to review the definitions and issues surrounding the concepts of “social entrepreneurship” and “social enterprise”, and to understand how they are related to the social economy concept in Québec. In a seminar held on June 5, 2015, participants coming from various horizons discussed the emergence of new social entrepreneurs in Québec, noticing that while not explicitly referring to the concept of social economy, almost all had incorporated their business either as a cooperative (usually a solidarity cooperative) or a nonprofit organization.

1.3.2. Are Québec social economy enterprises, social enterprises in the sense of the EMES definition?

The relative absence in Québec of the term “social enterprise” in current institutional, academic, and practitioner usage does not mean that the concept is totally incompatible with that of “social economy enterprises”. They overlap and are related, especially when we refer to the definition of social enterprises as proposed by the EMES International Research Network. When comparing the legal definition of the social economy in Québec with the EMES indicators (which are not strict conditions to be met) of social enterprise (see Table 1), it becomes clear that Québec’s social economy enterprises fit most of the EMES social enterprise criteria—with some exceptions, the two most notable being:

- The Québec Social Economy Act includes all co-operatives, mutual societies, and associations running economic activities, whereas the EMES definition is open to other non-social economy legal forms (namely private shareholders' companies having a primary social aim) but excludes co-operatives and nonprofit organizations aimed exclusively at the mutual interest of their members. It retains only those that serve the general interest and have a multi-stakeholder membership (Defourny and Nyssens 2006: 9).
- The Québec Social Economy Act includes organizations offering little or no paid work, such as housing nonprofit co-operatives and associations, which in Québec own large assets (Bouchard and Hudon 2008), while the EMES approach stresses the existence of "some paid work" in the organization. However, the Québec Act does mention that social economy enterprises should aspire to economic viability.

One factor that might explain the near absence of the need for a concept of social enterprise is that in Québec, contrary to what is the case in many European countries, work integration, domestic help, daycare, and multi-stakeholder organizations already have a legal social economy basis, namely as co-operatives (including solidarity co-operatives) and nonprofit associations. Also, the Québec law on co-operatives is very explicit about strict abidance to specified principles, namely democratic governance by members and profit distribution limitation principles. By and large, the terms "social enterprise" and "social entrepreneurship", when used by the English-speaking community and in the business schools of both the Québec English- and French-speaking communities, refer to nonprofit organizations that undertake commercial activities. This basically corresponds to the definition included in the Québec Social Economy Act.

The definition of social enterprise proposed by EMES also includes other legal forms, such as private capitalist enterprises, if they meet a set of criteria. In Europe, "labels" were in some cases created to formalize the existence of these hybrid forms of enterprises, such as the "community interest companies" in the United Kingdom and the Belgian "social purpose companies" (*sociétés à finalité sociale*). As Québec does not have a specific legal form or a label for these kinds of organization, the latter would, in Québec, be grouped together with other existent and traditional legal forms of enterprises, including those of social economy enterprises when applicable.

Thus, certain types of enterprises that are recognized as pursuing a social goal are still understudied and have yet to be properly categorized into a typology. Based on this general overview of the social economy and the social enterprise concept in Québec, the next section explores these issues, proposing a framework for classifying social economy enterprises in Québec in relation to the notion of social enterprise.

Table 1: EMES' approach of social enterprise and Québec's social economy

EMES' approach of social enterprise	Québec's legal definition of the social economy	Difference between Québec's law and the EMES framework
<p>An economic project</p> <ul style="list-style-type: none"> • A continuous production • Some paid work • An economic risk 	<ul style="list-style-type: none"> • "All the economic activities with a social purpose carried out by enterprises whose activities consist, in particular, in the sale or exchange of goods or services, and which are operated in accordance with the following principles." • "Aspires to economic viability." • "Is operated in accordance with the principles set out in the first paragraph, by a co-operative, a mutual society, or an association endowed with legal personality." 	<ul style="list-style-type: none"> • Québec Act includes all co-operatives and mutuels (of those, EMES would only include solidarity co-operatives). • EMES includes enterprises taking legal forms other than those typical of the social economy (Québec Act does not), provided they have a primary social aim. • Québec Act includes co-ops and nonprofit associations that offer no paid work (EMES only includes organizations with some paid work).
<p>A social mission</p> <ul style="list-style-type: none"> • An explicit social aim • Limited profit distribution, reflecting the primacy of social aim • An initiative launched by a group of citizens or third-sector organization(s) 	<ul style="list-style-type: none"> • "The social purpose is a purpose that is not centred on monetary profit, but on service to members or to the community and is characterized, in particular, by an enterprise's contribution to the well-being of its members or the community and the creation of sustainable high-quality jobs." • "The purpose of the enterprise is to meet the needs of its members or the community." • "The rules applicable to the enterprise prohibit the distribution of surplus earnings generated by its activities or provide that surplus earnings be distributed among its members in proportion to the transactions each of the members has carried out within the enterprise." 	<ul style="list-style-type: none"> • In both, social mission is defined by surplus distribution limitation. • Québec Act also defines the social purpose as serving members and community. • EMES also defines the "social component" by referring to collective initiatives (groups of citizens or civil society organizations).
<p>A participatory governance</p> <ul style="list-style-type: none"> • A high degree of autonomy • A participatory nature that involves various parties affected by the activity • A decision-making power not based on capital ownership 	<ul style="list-style-type: none"> • "Is not under the decision-making authority of one or more public bodies." • "The rules applicable to the enterprise provide for democratic governance by its members." 	<ul style="list-style-type: none"> • Both are explicit about democratic governance not based on capital ownership. • EMES adds multi-stakeholder participation.

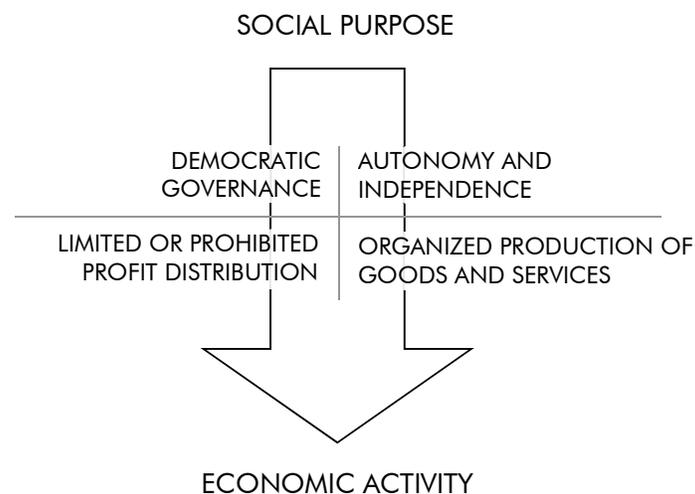
Sources: Defourny & Nyssens (2011) and the Québec Social Economy Act (Québec 2013) (our translation).

2. A PROPOSED FRAMEWORK FOR SOCIAL ECONOMY ENTERPRISES IN QUÉBEC

Québec, as was previously discussed, has an established legal framework for social economy enterprises that recognizes three main legal forms: co-operatives, mutual societies, and associations. But there are also organizations that are identified, by themselves or by researchers, as taking part in the Québec social economy, while not sharing its core institutional characteristics. Others still are in fact part of the social economy, as it is institutionally defined, but are named differently, on account of their innovative dynamics or of the language used (English versus French). A social economy framework should provide a broad conceptual basis for understanding the field as a whole.

We propose to refer to the four core distinguishing empirical features of social economy organizations as identified by the Québec Social Economy Act and summarized by Bouchard et al. (2008; 2011): democratic governance; restricted or prohibited distribution of surplus; autonomy and independence from the state; and organized production of goods or services that serve mutual or general interest objectives. These characteristics are usually institutionalized by rules or bylaws.⁴ Just one feature alone would be insufficient to capture the essence of the social economy, and none of the features has precedence over any other. Instead, it takes a combination of these characteristics to define a social economy enterprise. These features integrate the social purpose of the enterprise into concrete rules of behavior, and the degree to which they are embedded in legal frameworks gives them stability in the long run. Figure 1 below illustrates these features, showing that it is through them that these organizations perform an economic activity to the benefit of their social purpose, and that they likely will perpetuate their social mission over time.

Figure 1: Diagram of social economy enterprises' distinctive features



Source: Bouchard et al. (2011)

⁴ A study conducted for Human Resources and Skills Development Canada by Statistics Canada (McDougall 2007) demonstrated that, out of a probabilistic sample of the Canadian Business Registry, enterprises other than co-operatives, non-profits, or mutual societies that adopted features characteristic of the social economy (as defined in Bouchard et al. 2006, and reiterated in Bouchard et al. 2011) were statistically absent.

In theory, each of these criteria could be found in other legal forms of enterprise, in a more or less institutionalized manner, going from *ad hoc* behaviors (such as in the case of corporate social responsibility) to internal or external rules that guarantee the perpetuation of the principle over time. In addition, if enterprises were to be considered as social enterprises on the sole account of their purpose (as proposed by authors such as Austin 2004; Boschee 1995; Dees 2001; Drayton and MacDonald 1993), then the purpose would be a sufficient criterion. That said, one would still need to delve into the different definitions of “social purpose” and the normative meanings they may carry.

The above exploration leads us to suggest a framework for analyzing social enterprises as a larger whole. This framework, which is well adapted to the Québec Social Economy Act (Québec 2013), aims to qualify social enterprises according to the extent to which they correspond to organizational features. Organizational features, such as organized economic activity, limited distribution, democratic governance, and autonomy and independence, make it possible to distinguish social economy enterprises from other types of organizations in the economy (Bouchard et al. 2011). To include organizations that do not operate with those organizational features, purpose features can be considered as a further distinguishing feature. According to the Institut du Nouveau Monde, for example, one such purpose feature could be an innovative entrepreneurial response to social needs that is participatory (involving the community), is ethical and promotes social change, and leads to sustainable social benefits. Such distinction is also what is sought by applying the labels of “B Corp” as in the US, “social utility” as in France, “social purpose” as in Belgium, or “social action” as in Spain.

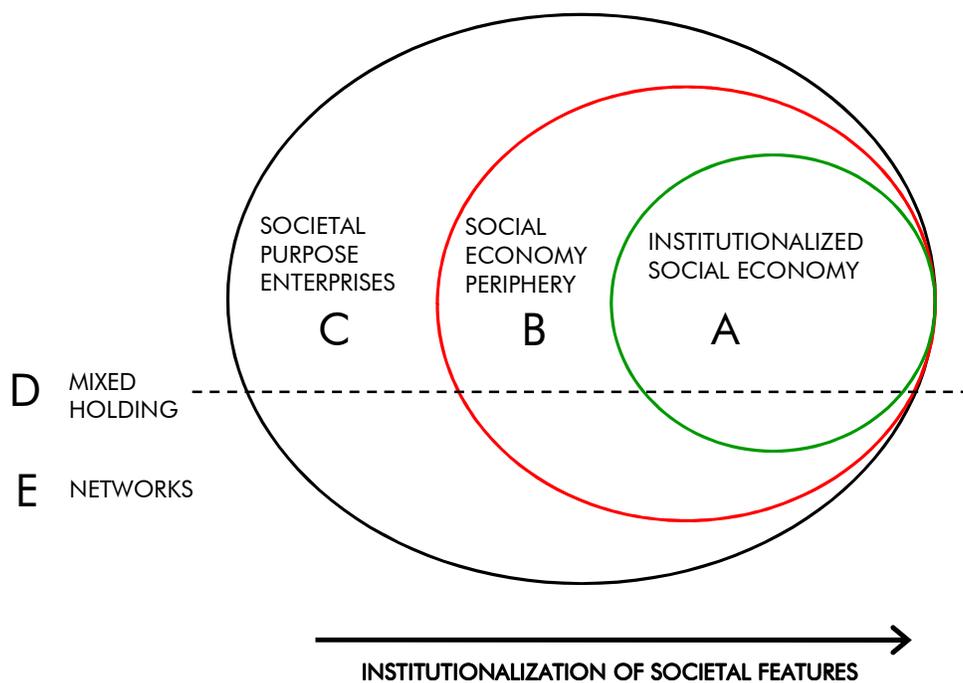
The framework therefore enables to identify three categories of social enterprises, by applying three successive filters (see Figure 2):

- A. Enterprises that are constrained by law or other rules to perpetuate their societal purpose through their social economy organizational features. These are the typical social economy enterprises, and they comprise the core of the social economy. In these organizations, the social economy principles are strongly institutionalized by the application of rules and laws, and can be reinforced by public policy. Some examples in Québec are social economy childcare centers, domestic help social economy enterprises, work integration enterprises, and solidarity co-operatives.
- B. Enterprises that correspond to organizational features of the social economy, as defined in the Québec Social Economy Act, but do not share the same institutionalized legal forms as category-A organizations. This corresponds to the inclusive social economy movement or social economy periphery—a larger set of organizations than the social economy such as defined by the Social Economy Act. This category comprises two kinds of organizations: first, shareholder for-profit subsidiaries of typical social economy enterprises, which are borderline cases that can be placed at the frontier of categories B and C, because they can be structured in a for-profit organizational form but are owned by a typical social economy enterprise; and secondly, peripheral organizations, which are those that “take part” in the social economy, even if they do not meet *all* the criteria defined in the Québec Social Economy Act.
- C. Economic private entities with a societal purpose that do not necessarily have institutionalized rules that guarantee the perpetuation of their mission or their organizational features (excluding enterprises with *ad hoc* corporate social responsibility behaviors).

It is also possible to identify two other cross-sectional categories of social enterprises in such a framework (see Figure 2). The cross-sectional categories (D and E) were identified for clarification purposes and will not be further explored in this report:

- D. Mixed holdings, which comprise a corporation with one or more social enterprises of the three categories described above. An example is Cirque du Soleil, which is a corporate organization that also includes a nonprofit organization dedicated to the diffusion of circus arts (Tohu) and a private foundation aiming at fighting poverty by providing access to water and sanitation in developing countries (One Drop).
- E. Networks of social enterprises that can also be made up of organizations belonging to any of the three or four categories described above. An example is CAP Finance, which is a network of solidarity finance organizations in Québec. It is composed of a typical institutionalized social enterprise (La Caisse d'économie solidaire Desjardins) and social enterprise movement representatives (La Fiducie du Chantier de l'Économie sociale, Filaction, Fondation, Le Fonds de solidarité FTQ, Le Réseau d'investissement social du Québec and Le Réseau québécois du crédit communautaire).

Figure 2: Framework of the social economy enterprises field in Québec



Source: Bouchard, Cruz Filho & Zerdani

3. THREE CATEGORIES TO MAP THE FIELD IN QUÉBEC

This section describes the characteristics of categories A, B and C of the proposed framework above, which help to understand social economy versus other types of “social enterprises” in Québec. In the following, we will present some exemplary cases in order to illustrate each category.

3.1. Institutionalized social economy

The institutionalized social economy category covers social enterprises that are characterized by the typical social economy principles and rules. They correspond to EMES typical social enterprise indicators as well as to Québec’s typical social economy organizations. Some examples in Québec that are close to the EMES definition of a social enterprise are the following:

- Childcare centers (*centres de la petite enfance*, or CPEs) are nonprofit organizations (NPOs) or co-operatives in which at least two thirds of the board of directors are parents of children who attend or will attend the childcare center. A CPE offers reduced-contribution places (currently at 7C\$ a day) to seven or more children, and is largely financed by the state.
- Domestic help social economy enterprises (*entreprises d’économie sociale en aide domestique*, or EÉSADs) are NPOs or co-operatives that were created to provide domestic help services to elderly and disabled people who are in the process of losing their autonomy, and at the same time legally regularize the jobs in this sector, avoiding unreported employment. EÉSADs have mixed revenues, combining market and non-market sources. The latter are provided by a public policy named *Programme d’exonération financière en services à domicile* (PEFSAD).
- Work integration social enterprises (WISEs) in Québec are NPOs whose main objective is the social and economic integration of disadvantaged and excluded people into the workforce. They also have mixed revenues sources, and are supported by a public policy specially created for them. While some co-operatives may also have a work integration mission, they cannot be included in the Québec work integration government program. They can however be recognized by the government as “adapted work enterprises” if they employ people with physical or mental disabilities.
- Solidarity co-operatives are multi-stakeholder co-operatives composed of two or three categories of members: users of the services provided by the co-operative; workers working within the organization; and/or supporting members. Supporting members can be persons or organizations that share and support the co-operative’s mission. This combination allows the emergence of a joint construction of supply and demand. An example is the *Coopérative DesÉquilibres*, a solidarity co-operative devoted to youth sports and social involvement, which is also mentioned by INM as an “inspiring example” of social entrepreneurship, under its *À go, on change le monde* program.
- The Québec Social Economy Act also covers more established co-operatives such as the *Caisses populaires Desjardins* (credit unions), mutual societies such as the *Groupe Promutuel* in the insurance sector, agro-food cooperatives and nonprofit organizations such as the many housing co-operatives and associations.

3.2. Social economy periphery or inclusive social economy movement

Two types of organizations belong to category B described above, that is, the social economy periphery or inclusive social economy movement. The first type is composed of subsidiaries of social economy enterprises, which sometimes have complex structures, including entities under their (partial or full) control. We define a subsidiary as “a company in which the reporting entity owns a majority (more than 50%) of the voting shares” (Statistics Canada 2011). The focus here, in category B, is on subsidiaries of social economy enterprises that are not themselves social economy enterprises (individual enterprises, stock corporations, partnership corporations, etc.). Some examples in Québec are *lôgo* (owned by the agro food co-operative *Agropour*), *Desjardins Capital de risque* (owned by *Desjardins* credit unions), and *Auberge L’Autre Jardin* (owned by a non-governmental organization, *Carrefour Tiers Monde*). According to this framework, non-social economy subsidiaries of social economy enterprises can be considered as being part of the social economy if they meet the following criteria (Bouchard et al. 2011):

- The majority control of the subsidiary belongs to the social economy enterprise or a set of social economy enterprises that are direct or indirect (through a holding company) shareholders of the subsidiary. When ownership is shared with organizations that are not social economy enterprises, the following indicators can be used:
 - The majority of board seats are reserved for the social economy enterprise (or a set of social economy enterprises).
 - If there is a general meeting, a majority of votes must be given to the social economy enterprise (or the social economy enterprises).
- The activity of the subsidiary, in the case of subsidiaries of co-operatives or mutual societies, is linked to the activities of the members. In the case of subsidiaries of associations, the activity of the subsidiary is linked to the activities of users and recipients of goods or services.
- The profits of the subsidiary that are not reinvested in the activities of the subsidiary are distributed to the controlling social economy enterprise(s), proportionally to the capital held (which may not be less than 50 percent).

The second type is composed of “peripheral organizations”. The social economy field can be described, at least from a conceptual point of view, as composed of entities that form its “core”, as well as of “peripheral” entities (Desroche 1983). There is a general consensus that some organizations “take part” in the social economy even if they do not meet *all* the criteria enounced in the Québec Social Economy Act. The *Fiducie du Chantier de l’économie sociale* (a financial trust dedicated to the social economy), *Fondation CSN* (a union fund dedicated to job creation and sustainable development), or *Centraide du Grand Montréal* (a public foundation where volunteers collect and allocate the funds to community-based organizations) are examples of this type. In those cases, it suffices that the organizations meet only some of those criteria, namely in accordance with rules, laws, or internal bylaws (Bouchard 2013).

- Some organizations have other legal forms. Among these are: *Auberge L’Autre Jardin*, which is a corporation that is, as a subsidiary, wholly owned by a non-governmental organization; the Québec development funds, such as the *Fiducie du Chantier de l’économie sociale* trust, the *Fondation CSN*, or the *Fonds de solidarité FTQ*, which are share-owned worker unions’ funds; and some charities, such as *Centraide du Grand Montréal (United Way)*, which is a community public foundation.

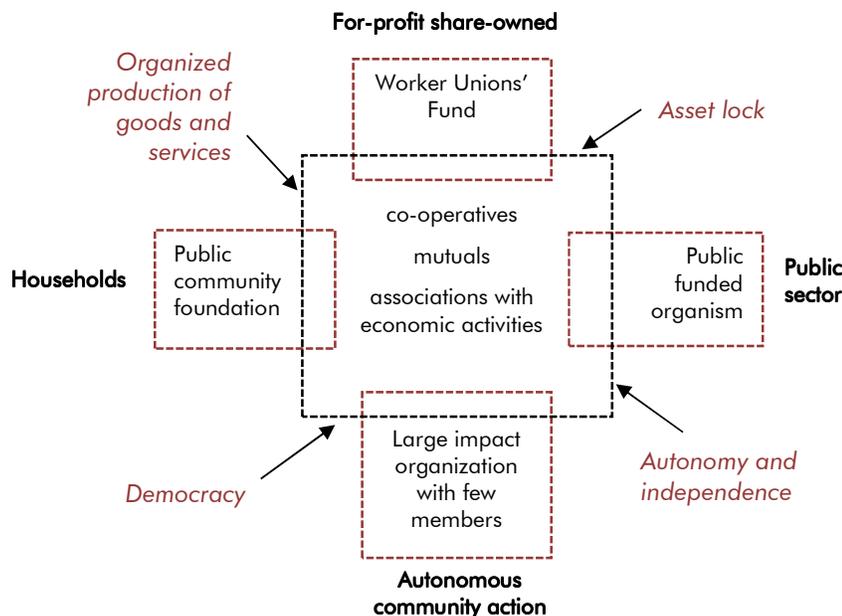
- Some only mobilize non-monetary resources, such as local exchange trading systems called the Accorderies.
- Some are governed by citizens but are funded by public resources, implying control by a public entity, such as the controlled exploitation zones or the youth employment centers.
- Some, on account of their legal status or of their specific governance and membership model, allow for proportional voting process in various forms. Among these are large co-operatives and certain insurance mutual societies or worker unions' funds.
- Some are allowed by law to distribute net assets among members in case of closure or bankruptcy, such as agro-food co-operatives.
- Some have a very small number of members participating in the decision-making process while still having an important social impact, such as some enterprises in the cultural sector.
- Some, finally, can be recognized as taking part in the social economy in that their activities, governance rules, and modes of functioning correspond to the social economy principles. Among these are some public community-based foundations such as Centraide du Grand-Montréal (United Way), which fosters local community development.

These examples show that the scope of the social economy movement is in fact quite large, and yet precise criteria are nevertheless needed to define it and the organizations that belong to it. In the following, we will explain in detail how social economy criteria can help understand why such organizations are considered as participating in the social economy and, hence, could be considered as "social enterprises".

- Social economy trust funds, such as the Fiducie du Chantier, perform an activity that may not be considered as a "production" activity, but they do not distribute profits; they have a collective, democratic, and autonomous governance; and they are dedicated to the social economy, therefore producing a collective service and acting as a countervailing power in the market.
- Worker unions' funds (e.g., Fondation and Fonds de solidarité FTQ) have a share capital ownership structure but operate with a participatory structure. Their investments aim to reinforce the comparative advantages of economic sectors while at the same time maintaining and developing employment as well as fostering sustainable development. They therefore produce a collective service and act as a countervailing power in the market. Some consider these funds as fully-fledged social economy actors (Lévesque 2013).
- Community foundations, such as Centraide du Grand Montréal (United Way), have highly participative structures that contribute to the alleviation of poverty in a democratic fashion, therefore producing a collective service or credence good. Volunteers participate not only in fundraising but also in fund allocation. Sometimes such foundations develop a community-based approach in joint ventures with the government, such as the participation of Fondation Lucie et André Chagnon in "Québec Avenir d'enfants."
- Local exchange trading systems (LETS), such as Accorderies, Troc-tes-trucs, and The Swap Team, are mostly or entirely based on non-monetary resources. They produce a service and do not distribute profits. They also have a social mission and democratic and autonomous governance. They function under the economic principle of gift exchange and reciprocity (Polanyi 1944).

- Some of yesterday's community-based private initiatives are today's government-supported organizations, such as youth employment centers, and remain governed democratically by a board composed of a mixed group of people.
- Some NPOs, such as arts or cultural organizations, are engaged in activities that have a large impact on communities without democratically mobilizing a large number of members.

Figure 3: Illustration of the core and peripheral social economy organizations according to each of the main social economy criteria



Source: Bouchard et al. (2008) and Desroche (1983)

3.3. Social purpose enterprises

An enlarged view of social enterprise would also include for-profit entrepreneurs who pursue social or environmental goals, even though their organizations do not necessarily have institutionalized rules that ensure the perpetuation of their mission or organizational features. Some are traditional single-ownership for-profit enterprises that get involved in high-profile social or environmental missions. The founders of those enterprises are accordingly referred to as "social entrepreneurs" by the INM. Some of the Ashoka projects are also considered to be social purpose enterprises. These projects must meet five criteria: a new idea, creativity, entrepreneurial quality, ethical fibre, and social impact of the idea. This last criterion

focuses on the systems change of the candidate's idea, not the candidate. Ashoka is only interested in ideas that it believes will change the field significantly and that will trigger nationwide impact or, for smaller countries, broader regional change. For example, Ashoka will not support the launch of a new school or clinic unless it is part of a broader strategy to reform the education or health system at the national level and beyond.

(Ashoka 2015)

Some examples in Québec are⁵:

- Communauto (founded in 1994):
Since its founding in 1994, Communauto has been seen as a pioneer in America as the oldest and one of the largest car-sharing services on this side of the Atlantic. One of the largest companies of its kind in the world, Communauto is defined primarily as a business with a social and environmental mission. Car-sharing is a cheaper and more flexible alternative than ownership and renting. [Communauto's] objective is to offer a convenient and economical alternative to car ownership. Communauto thereby contributes to a reduction of both the number and the use of cars.
 (Communauto 2015, our translation)

It is interesting to note that Communauto was first created as a cooperative and, since its transformation into a shareholders' company, has expanded to France. It recently signed a partnership agreement with Toyota France for the usage of their hybrid car model.

- Lufa Farms (founded in 2009):
In 2011, [Lufa Farms] built the world's first commercial rooftop greenhouse. Through innovation and technology, [they] are striving to change the way cities eat. [Their] concept is simple: grow food where people live and grow it more sustainably.
 (Lufa Farms 2014)
- Takt-etik (founded in 2006, and certified as a B-Corp):
In a world where sustainability and corporate social responsibility are starting to become mainstream business practices and where actions speak louder than words, Takt-etik guides its clients to successfully embark on this process. Takt-etik relies on the expertise of eight advisors that have a combined 25 years of sustainability consulting experience, making it the largest firm of its kind in Québec. Takt-etik also relies on a network of partners to support its clients on specific needs such as water and energy management.
 (Takt-etik 2010)
- Invup (founded in 2011):
Invup.com is an online platform helping businesses and schools to manage their volunteer programs and donations.
 (Forces Avenir 2011)
- E-180.com is a private company website that encourages people to meet in order to exchange knowledge:
E-180 stems from the hard-held belief that all humans possess the power to develop their full potential autonomously, with a little help from their community. [E-180] believes that education is a relationship, not an institution, and that one hour of our time may change another person's life. [Their] mission is to promote these values by helping fellow humans share knowledge and connect with each other.
 (E-180 2015)

⁵ At the moment of writing this paper, these cases had been pointed out as exemplary of social entrepreneurship. For example, INVUP had been identified by Forces Avenir (See: http://www.forcesavenir.qc.ca/universitaire/finaliste_view/3349).

CONCLUSION

The concept of the “social economy enterprise” in Québec shares many of the characteristics of the concept of “social enterprise” such as it is defined by EMES. An important difference is that the EMES definition is an ideal-type proposed for research purposes and based on indicators which are not to be understood as strict conditions to be met, whereas the institutionalized definition of the social economy in Québec reflects a broad consensus among social actors in a given institutional context. Another important difference is that the EMES definition covers private shareholders’ companies with a primary social aim whereas the Québec definition only includes statutory social economy enterprises. Still, the dynamics that characterize the emergence of the new social economy in Québec offer an interesting perspective for digging into the questions raised by the ICSEM project regarding social enterprise models and their institutionalization.

Because Québec has a highly institutionalized definition of social economy enterprises (e.g., Cooperatives Act, Social Economy Act, Community Action Framework) and of some of their specific fields of activities (daycare, domestic help, work integration, employment for the disabled, youth employment centers, community economic development corporations, etc.), the use of the term “social enterprise” has been scarce. However, the field of the social economy is a changing one. Certain sectors that have long since been a part of the social economy may no longer feel they fit the new understanding of the social economy (e.g., credit unions, agro-food co-operatives). Or some large social economy enterprises may be regarded as part of this field but may not appreciate their being considered as part of it (e.g., longstanding and previously religious social organizations such as the YMCAs). Social actors recognize still other organizations, which do not meet all the criteria stipulated in the law (e.g., community foundations, workers unions’ funds, co-operatives, or NPO-owned shareholders corporations, etc.). Some want to be a part of the social economy but only fit the social or environmental purpose criteria, without meeting any of the organizational traits (e.g., Communauto, Lufa Farms). In addition, new hybrids are emerging that have dynamics combining philanthropy, entrepreneurship, and government aid (e.g., Québec Avenir d’enfants). Hence, the notion of social enterprise might be relevant at some point in order to capture those changing features of the field. But the risks associated with a view of “social enterprises” or “social entrepreneurship” as anything and everything has so far led most of Québec social economy actors to use the terms of social economy, new social economy, or collective enterprises.

In our view, to develop a framework for a typology of social enterprises in Québec, two steps must be accomplished. The first step is to identify empirical qualifying criteria for organizations that can be considered as social economy enterprises on the basis of the institutional definition in place. In Québec, where a highly institutionalized definition of the social economy is already in place, institutionalization is understood to refer not only to public recognition but also to mutual and societal recognition by the social actors themselves. The qualification criteria should thus be aligned with this consensual definition. In a second step, using these criteria, the exceptions, borderline cases, and new developments could then be identified and described. For example, the notion of social entrepreneurship, which is slowly gaining currency in Québec, could serve as a starting point for defining commercial ventures that are marked by their social purpose. Such a qualification framework could serve as the basis for a typology.

The proposed typology for Québec identifies three types of social enterprises. The first category includes only those enterprises recognized by the Québec Social Economy Act, which have institutionalized all the criteria of the social economy. The second category covers all enterprises that are closely linked to the social economy sector, pursue a societal mission, and adopt, in an institutionalized manner (law, rule, bylaw) some features of the social economy as defined in Québec. This includes subsidiaries of institutionalized social economy enterprises, as well as peripheral organizations of the social economy movement. The third type, which is large and inclusive, covers all enterprises that pursue a societal (social or environmental) mission, notwithstanding their organizational features or modes of production. It is important to note that many social actors and academics in Québec consider the perimeter to be limited either to the social economy periphery or to institutionalized social economy organizations—in other words, to collective or community-based enterprises (as defined in Lévesque 2002).

Some organizations that are characterized by Québec's social economy principles and rules also have the core features that describe the typical EMES social enterprise, as they are characterized by institutional and organizational social innovations. It is the case with domestic help social economy enterprises (*entreprises d'économie sociale d'aide domestique*, or EÉSAD). On the institutional side, the EÉSAD model combines new forms of mobilization by marginalized actors and new modes of financing in order to answer unmet needs for domestic services, employing workers who were hitherto excluded from the labor market (Jetté et al. 2006), hence serving general interest goals. Public policy in this field was co-constructed by social actors and public administration, which also represents an institutional innovation. On the organizational side, EÉSADs allow the participation of different kinds of stakeholders, users/clients, and employees in the production and use of domestic services.

One of the main contributions of the typology proposed in this article is the introduction of a new starting point for the development and description of types of social enterprise. Usually, typologies are defined broadly and then gradually narrowed to identify social enterprises. The proposed typology does the opposite, starting at the heart of the social economy and then adding additional layers for identifying other types of social enterprise. We believe that such a methodology could be a first step in the effort to develop typologies that are based primarily on social economy concepts and principles.

As Alex Nicholls (2010) noted, research on social enterprises and social entrepreneurship is still at a pre-paradigmatic stage, and its progression to a post-paradigmatic stage “can be understood as a contested process of legitimization between different actors, discourses and institutional logics” (p. 614). In this article, we have presented the concept of the social economy, which is used in Québec as a result of a broad consensus among a wide range of social actors including co-operatives, local development groups, worker unions, community groups, feminist, environmental, rural, and urban social movements, and government. Of late, the concepts of social enterprise and social entrepreneurship have also been gaining ground among actors coming from English-speaking business schools and from business philanthropy, but not exclusively. Further research should involve digging deeper into the discourse of these sets of actors and examining the institutional logics on which they are based. This would advance our understanding of what is at stake in terms of organizational models, paths of institutionalization, and development paradigms.

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