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Social and Solidarity Economy (SSE): political and legal circumstances in Portugal, Spain and Brazil[1]

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Abstract

Social and Solidarity Economy appears to make an appearance, with more or less vitality all around Europe, USA and Latin America. It emerges as an alternative practice to the established economic system, and as a motor to transform classical views of the market rationale against other spheres of human life. In some countries, this proposal stems from grassroot movements, which gained particular strength since the 2008 financial crisis; in other countries, its implementation is also the result of organised political action from above.

The objective of this talk is to understand how this movement is gaining strength, taking into account its legal setting, political structures, types of development, and the logic behind the actors who impersonate it. The founding ecosystems of the SSE, its institutionalisation, both from a legal and public policy view, and relevant measures taken to develop a collective and unifying entrepreneurship are amongst the aspects analysed here. The proposed approach has an institutionalist backdrop as we look at "interpreting the role of institutions in shaping political and social outputs" (Hall & Taylor, 2002: 194), from the hypothesis that institutions influence behaviours.

Our qualitative analysis focuses on collective actors from political and governmental institutions, from which depends the creation (or not) of a structure (favourable or not), that works in one hand as a facilitator (or not) of actions that constitute the SSE, and on the other as a self-structuring mechanism. There is a similar approach to alternative

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actions, both practical and symbolic, which offer meaning to its relationship and interdependency. The analysis of these practices points to "how" individuals operate within the created legal and political state of affairs, and "how" institutions affect their behaviours in three geographically separate territories, namely, Porto in Portugal, Minas Gerais in Brazil and Barcelona in Spain. We have followed the movement in the 3 territories during the last decade, with an ethnographic approach, making use of documentary sources, reports of observation and informal conversations.

Conclusions point at the importance of grassroots initiatives for the consolidation of the social movement, which gains strength from the legal setting and development policies. Despite representing a key element in the consolidation and validity of both legal and development policies, these structures appear as a direct response to the structuring role of grassroots movements. However, these represent economically fragile alternatives against the ruling economic model and are very dependent of the political will in reconciling the interests with the needs of the society. As a movement on the rise against the dominant capitalist system, charitable causes like the international food sovereignty movement gains strength, so we do not believe there will be significative drawbacks, even with the withdrawal of development policies, as it is clear in the Brazil of Bolsonaro.

1. On the crises of the current economic and social model

The unsustainability of the capitalist economic system, in its various variants, is repeatedly pointed out as a cause for the search for alternative modes of socioeconomic organisation that put life and the planet at the centre (Castells et al., 2017). Several crises have shown the exhaustion of the model anchored in the growth that destroys natural ecosystems, exploits people and degrades the quality of life, accentuating social and territorial inequalities.

According to some authors, the most current pandemic crisis is seen as a demonstration of such questioning. Among them, Sousa Santos (2020) states that the pandemic crisis, and its contours, are "one demonstration among many of the model of society that began to be imposed globally from the 17th century onwards and which is today reaching its final stage". It is a crisis that clearly reveals the fragilities of an economic and social model based on the massification of the economy and of life governed by principles of scale, whether in consumption, education or care. This crisis is not immune to economic and social inequalities, despite its apparent democratic nature given the biological conditions for the

spread of the virus. The most vulnerable and poor populations are more affected both by the contamination and its consequences in terms of health injuries, as well as in terms of the socioeconomic impacts that are felt (Sousa Santos, 2020).

In 2008, the financial crisis in the Western world had already revealed a crisis of the monopolistic mode of regulation which had been present since the 1970s/80s, questioning the neoliberal paradigm based on an overdetermination of the economic rationality of the market and on its supremacy over the other spheres of life. Since then, deregulation has become the watchword and the financial crisis has turned into an industrial crisis, an employment crisis, a fiscal crisis and, finally, a social, political and institutional crisis that threatens to destabilise society as a whole (Castells, Caraça and Cardoso, 2012), affecting new categories of the population once immune to social vulnerability, such as young and middle-aged adults (35-55 years), many of them with higher education qualifications but in general all educated and qualified.

Movimento dos Indignados in Europe or *Ocupe Wall Street* in the United States are social movements of reaction against public spending cuts made by governments to combat the recession and result from the awareness of the impacts of the crisis and the austerity measures imposed. This is particularly observed in southern European States due to the regression of Welfare State social policies that threaten long acquired rights and trigger struggles for alternative values to predatory capitalism (Conill, 2012: 15).

We devote the next section to a discussion of the different perspectives for tackling the new and old social problems raised by the dominant economic model. Based on this theoretical framework, we seek to operationalise a proposal for institutionalist analysis of the Brazilian, Catalan and Portuguese cases, discussing their legal-political orientation with regard to the social and solidarity economy understood as a field of alternatives. The reflection focuses on the importance of the judicial and legal framework and of the policies to foster the solution in question, their articulation with grassroots initiatives, questioning their progressive or reformist nature.

2. From continuity with the model of capitalist economy to the proposals of transformative economies

The multiple responses to the successive crises that, since the 1970s have been devastating the world, can be typified according to the degree of continuity and rupture proposed regarding the dominant economic model.

Continuity solutions have been theorized within the scope of social entrepreneurship and innovation approaches, presenting a reformist approach towards the current economic model. The approaches of rupture are equated within the framework of transformative economies that "aggregate a diverse ecosystem, with multiple movements and phenomena of socioeconomic practices that constitute alternatives to the hegemonic model (Porro, 2016; Suriñach, 2017). In this article we will mainly focus on the transformative proposals that are named in Europe as social and solidarity economy and in Latin America as solidarity economy.

2.1. From continuity with the model of capitalist economy

The recent approaches to social entrepreneurship and social innovation stem from the Anglophone world, being consolidated in the new millennium by finding echoes in Europe, especially through the European Agenda for Social Economy. These approaches are strongly associated with the affirmation of the non-profit sector or the third sector, which is increasingly requested to act in solving problems in areas such as education, health, social services, as well as in cultural and recreational services. They arise from the British tradition of charities with a charitable root or foundations with a philanthropic root, marked by the predominance of liberal ideas and by the reduced economic intervention of the State, in a functionalist and economic vision of the role of these organisations in current societies.

Two perspectives stand out in this context: *Management School* or *Earned Income School* (Boschee & McClurg, 2003) and *Social Innovation School* (Dees, 1998; Bornstein, 2007; Mulgan, Tucker & Sanders, 2007). The *Management School* or *Earned Income School* advocates the use of entrepreneurial mechanisms and tools for the effective management of the non-profit sector, whether in terms of strategic planning, or people management, or even in the economic management of businesses, proposing the development of business activities as a guarantee of sustainability and the pursuit of social objectives. The *Social Innovation School* takes up the role of the classical entrepreneur in fostering innovation stressed by Schumpeter (1996 [1905-1950]) and shifts it to the non-profit sector, considering the social entrepreneur as one who addresses social problems and needs in

an innovative way (Hoogendoorn, Pennings & Thurik, 2010) or as defined by Bill Drayton, founder of Ashoka (1980), as one who reforms or revolutionises the model of producing social value in the areas of education, health, environment and access to credit. In the early 1990s, the concept of social entrepreneur became descriptive of social sector innovators, in comparison with the actions of business entrepreneurs. According to Dees (2001), the social entrepreneur, starting from a challenging context, elects a social mission in which they seek to attack the causes of social problems and to produce innovative responses in a context of scarcity of resources. The empowerment of communities, the social impact of changes, as well as the scale, reach, replicability and sustainability of initiatives are metrics of this approach that is transversally oriented towards interventions in any sector of the economy, articulating Market, State and Third Sector actors for the benefit of the logic of proximity and rationalisation that the Welfare State was unable to guarantee.

They refer to initiatives that seek to mitigate or mask the most blatant aspects of capitalist exploitation, without presenting truly disruptive proposals regarding economic globalisation and financial capitalism, the main causes of the degradation of living conditions.

From the perspective of social and political theory, both approaches align with the so-called Third Way. According to Giddens (2001), one of its fierce supporters, the Third Way proposes a "democratisation of democracy" by bringing the State closer to citizens, or rather, by the civil society taking on responsibilities and obligations that used to belong to the State. The State withdraws from the implementation and coordination of social policies, while remaining the main funder and controller of their implementation, subjecting the management of social policies to the market rules. From the point of view of social policies, the welfare mix model (rather than the welfare state) is required with a sharing of responsibilities for social protection between the State, the market and the third sector. It is in this context that classical entrepreneurial policies, once called paternalistic or philanthropic, are now labelled as corporate social responsibility and that the third sector is generically regarded as the mouthpiece for society and community, in a clear strategy of withdrawing the State from social policies, reducing costs and rationalising resources according to market logic.

2.2. The proposals of transformative economies

Transformative economies (Porro, 2016; Suriñach, 2017) represent a proposal to break with the current *status quo* and promote alternative paths and collaborative, democratic

and empowering processes that guarantee respect for the environment, culture, communities and, above all, people, who are placed at the centre of the economy. This is the case of agroecological production, responsible consumption, grassroot cooperatives, social currencies, time banks, solidarity canteens or ethical finance. They refer to the "other economy" (Cattani, Laville, Gaiger *et al*, 2009) or to alternative economic practices (Connill, 2012) that differ from the classical pattern of the capitalist market economy, now questioned within the sustainable development paradigm. They point to ideals and practices that are presented as a "superior material and human alternative to the capitalist economy" that "is opposed to exclusionary, socially and environmentally predatory practices" (Cattani, 2009: 7). The principles and values of "solidarity, sustainability, inclusion, cooperation, social emancipation" (Cattani, 2009: 7) constitute the ideology of the "other economy".

In this proposal, the concept of solidarity economy that takes on a strong expression in French-speaking Europe in the 1990s acquires significance, also finding a relevant itinerary in southern Europe and Latin America and more recently in the USA. From this diversity of geographical origins arise varied conceptions, but always anchored in the idea of solidarity and cooperation to the detriment of individual interest and material gain. Based on the principles of the common good and reciprocity, it diverges from the perspective of vertical solidarity, welfare and excessively subsidiary of the State, characteristics that social economy ended up taking on. It is therefore a proper concept to the renewal of these practices and "to the new recurrent challenges of the emergence of solidarity with the most underprivileged" (Amaro, 2003).

By reaffirming the original principles of the social economy, the solidarity economy proposes an alternative social project, with a political aspect, emphasising the need for institutional commitments that promote emancipation and democracy in its internal and external functioning.

As Defourny and Develtere (1999) state, unlike what happens in some Latin American countries, in Europe the designation of solidarity economy does not supplant or compete with that of social economy, but rather complements it. It gives visibility to collective forms of organisation of civil society, based on the original principles of the social economy, and outlines its most innovative aspects.

In Europe, examples of the new social economy (Defourny, Favreau & Laville, 1998) or the solidarity economy continue to be initiatives in reaction to the economic crisis and massive unemployment of various social groups, by creating job and income

opportunities for vulnerable people and families, as well as services to meet the needs of deprived communities. They are also the result of movements contesting the models of intervention of the Welfare States, creating responses to the problems of poverty and social exclusion, quality of life and the environment, within a context of seeking new models of sustainable development (Estivill, Bernier & Valadou, 1997).

In the so-called developing countries in Africa, Asia and Latin America, the solidarity economy is explicitly taken on as a project for society to which some political and trade union organisations adhere. Solidarity entrepreneurships articulate the economic, political and social dimensions, guaranteeing, as Coraggio (2007) stresses, the extended reproduction of life, which encompasses not only the satisfaction of material needs, but also the quality of life of people and territories. Thus, the breadth of activities undertaken in the solidarity economy seems to encompass not only social services for vulnerable, typically European, publics, but all forms of "expanded reproduction of life", including in this designation by Coraggio (1994 *apud* Cunha & Santos, 2011) both the satisfaction of basic needs and the improvement of the quality of life, whether with the production of goods and services, commercialisation, exchanges, credit or finance.

3. An institutionalist perspective on the field of the social and solidarity economy

The analysis we propose is the result of a qualitative and ethnographic approach on the experiences of Brazil, Barcelona and Portugal with regard to the ecosystems of the social and solidarity economy over the last 10 years.

The objective was to try to understand the path of these countries within the scope of responses to the crises of the current economic model in the field of socioeconomic transformation, considering the legal framework and the political-institutional structures, the development modalities and the logics of the key actors who drive them, without any pretensions of exhaustiveness, but only with the aim of reflection and debate on the experiences in affirmation. The analysis is supported by participant observation records of various initiatives, semi-structured and open interviews with activists and members of organisations, as well as analysis of documentary sources.

The proposed approach is institutionalist in nature since we seek to "elucidate the role played by institutions in determining social and political outcomes" (Hall & Taylor, 2004: 194), on the assumption that institutions affect the behaviour of individuals. It concerns the political-institutional and legal conditions created by national and/or regional governments in the field of the social and solidarity economy which we consider to be

driving factors, or not, for the attitudes and practices developed. The analysis of the practices and actions - which refers to "how" the subjects are operating with the political-institutional and legal conditions created, and "how" the institutions are affecting their behaviours -, is conducted in an illustrative and exemplifying way of what is happening in each of the three experiences analysed.

We consider that the political-institutional and legal conditions are one of the elements of the dynamization ecosystems[2] of socioeconomic transformation, which integrates the set formed by structures and actors. The structures refer to collective actors who promote policies and practices favourable, or not, to the development of solutions. They include representative organisations, grassroots organisations, as well as governmental bodies (national, regional and local) and the education and training institutions themselves. Regarding the actors, that include individuals, nuclear and extended families, formal and informal groups, more or less extended collectives, which enliven, promote and produce the events, practices and organisations of the social and solidarity economy.

Our focus of analysis falls on the collective actors who constitute the governmental and political bodies on which depends the creation, or not, of a favourable or impeding structure of the field, functioning, on the one hand, as a facilitating motor (or not) of actions constituting the field of the social and solidarity economy, and, on the other, as its structurer. Thus, apart from the analysis of the political-legal structuration of the field, the practical and symbolic actions constituting the field that give it meaning are addressed.

3.1. The Brazilian solidarity economy politically institutionalised and rooted in the grassroot movement

The Brazilian case is paradigmatic from the political-institutional point of view. There was a political orientation to encourage the solidarity economy that was consolidated in 2014 with the approval of the first National Solidarity Economy Plan (2015-2019)[3] as an integral part of the government Multiannual Plan for medium term. This plan was an important instrument for guiding public policies, developed with the participation of key actors in

[2] The term ecosystem was imported from biology by Moore (1996) to the universe of economy, speaking of business ecosystems. As in biology, the concept of ecosystem refers here to a set of institutions and individual and collective actors that interact with each other and inter-influence each other, both internally and with the external environment.

[3] Available on http://portal.mte.gov.br/trabalhador-economia-solidaria/plano-nacional-de-economia-solidaria. Accessed 2 March 2016.

the solidarity economy during the various stages of the 3rd National Conference on Solidarity Economy[4].

Going back to 2003, the solidarity economy was no more than a set of isolated and fragmented initiatives as regards their insertion in productive chains and their articulation with the federal, state and local contexts. Former President Lula da Silva institutionalised the solidarity economy this year by founding the National Secretariat for Solidarity Economy (SENAES), within the Ministry of Labour and Employment (MTE), greatly motivated by the actions of civil society, namely the first two editions of the World Social Forum, which fought for the formal recognition of another way of being and of doing economy, with the motto "another world is possible".

Simultaneously, and on the grassroots level, the Brazilian Forum of Solidarity Economy (FBES) was created as a representative body of civil society's capacity for action, responsible for articulating and mobilizing the grassroots of the solidarity economy around the Charter of Principles and the Platform of Struggles. FBES was in contact with SENAES aiming to overcome traditional practices of dependency of the entrepreneurships that compromised their autonomy and to promote their qualification in economic, social and political terms.

The National Council for Solidarity Economy (CNES) was created within the SENAES, a consultative and propositional body for permanent communication between sectors of government and civil society. Its composition was the object of intense negotiations, integrating 56 entities, among government representatives, solidarity economy entrepreneurships and non-governmental entities, in order to guarantee the effective representation of the different actors in the definition of public policies for the solidarity economy[5].

These three structures created, from an institutional perspective, conditions for the growth of the solidarity economy in Brazil as a national policy orientation, associated with the configuration of local networks and a platform for dialogue, which put collectively-based entrepreneurship at the top of the public agenda.

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[4]The 3rd National Conference took place between 26 and 29 November 2014 in Brasilia, bringing together more than 1,600 participants to debate the theme "Building a National Solidarity Economy Plan to promote the right to produce and live in an associative and sustainable way". The national stage was preceded by a broad mobilization process with the participation of 21,825 people and 1,572 municipalities among which: 207 Territorial and Municipal Conferences with 16,603 participants; 26 State Conferences with the participation of 4,484 delegates; and 5 National Thematic Conferences with the participation of 738 people.

[5] Available on http://portal.mte.gov.br/trabalhador-economia-solidaria/conselho-nacional-de-economia-solidaria-cnes. Accessed 29 February 2016.

SENAES coordinated the National Programme of Popular Cooperative Incubators (PRONINC), where universities appear as key players due to their capacity to transfer knowledge to the entrepreneurships. Social technology[6] seems to be one of the robust aspects of the relationship between the entrepreneurships and academia.

As an illustration, we shall analyse the Community Banks Network which benefited from this concept, largely through the Banco Palmas project[7]. In Brazil there were over 100 community banks forming a national network. According to the National Secretary for Solidarity Economy of the Ministry of Labour and Social Welfare (MTPS), Paul Singer "the most significant thing is that they meet regularly, compare what happens in each one and help each other". "Community bank is completely opposed to capitalism. The private bank has an owner and it is the owner's interests that come first. In community bank, the users of the bank are the owners, these are poor communities in the periphery ...", he points out[8].

Some strength lines of the Brazilian project to foster the solidarity economy stand out: the political will to institutionalise it as an economic sector by placing SENAES under the MTE, and by configuring it on the side of wealth production with the same dignity as any other economic sector capable of creating work and wages; the role given to universities in incubating and strengthening this alternative way of doing economy, underlining the capacity to transfer knowledge that is not however or only top-down knowledge, but also an appropriation and systematisation of knowledge created at the base that the university is capable of formulating in the form of social technology.

Despite this explicit will, there were always obstacles to its development, namely due to budgetary constraints. The weight of the solidarity economy in terms of State budget expenditure has always been low[9].

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[6] Designation that appeared in Brazil at the beginning of the 21st century as an alternative to the concept of conventional technology and which, despite all its ambiguities, is consensually accepted to refer to "products, techniques or methodologies that can be reapplied, developed in interaction with the community and which represent effective solutions for social transformation". Source: Rede de Tecnologia Social. Available on http://rts.ibict.br/tecnologia-social/. Accessed 22 March 2016.

[7] Cf. Tecnologia Social para Finanças Solidárias. Available on https://www.youtube.com/watch?v=Yh7dVMOvask. Accessed 26 January 2016.

[8] Cecilia Coelho, Communication Adviser of the Ministry of Culture. Available on http://www.cultura.gov.br/o-dia-a-dia-da-cultura/-/asset_publisher/waaE236Oves2/content/bancos-comunitarios-prestam-servicos-financeiros-solidarios/10883. Accessed 26 January 2016.

[9] *In the case of the financial year 2010, the General Budget of the Union in the Annual Budgetary Law (LOA): R$1,766,021,794,352.00 (1.7 trillion reais); SENAES' budget in 2010 in the LOA: R$53,040,000.00 (53 million reais); PRONINC's action budget in 2010 resulting from SENAES, MEC and FINEP financing:*

With the election of M. Temer as president from 2016, threats began to emerge to change SENAES' jurisdiction or even to its extinction[10] within ministerial reforms. Despite the existence of a less favourable conjuncture, the solidarity economy was growing, with 27 forums scattered throughout the territory and with the multiplication of municipal laws on the solidarity economy[11]. The National Registry for Solidarity Economy Entrepreneurships (CADSOL), established in 2014 with 19,847 entrepreneurships[12] identified by the National Solidarity Economy Information System (SIES), which shows the strength of this sector of activity in the country, which is, however, oscillating, since in 2007 the mapping of the economy registered around 21,859[13].

Despite the uncertainty, in 2017, the National Solidarity Economy Policy is approved in the Senate (House Law Project no. 137/2017) which was awaiting approval since 2012 (Law Project no. 4.685/2012). It defines the beneficiary entrepreneurships, foresees the national registry, education actions, technical assistance and subsidised credit. It authorises the creation of the National Fund for Solidarity Economy to promote solidarity and self-managed economic entrepreneurships and associated work[14].

The growth of the Brazilian solidarity economy has consolidated some traits that are worth emphasising: a territorialised, feminine and networked economy.

On the territorial level, many Brazilian states have implemented municipal policies to foster the solidarity economy, with the approval of municipal laws. One example was Curitiba's Municipal Law for the Fostering of the Grassroots and Solidarity Economy (2015) in which the solidarity economy is recognised as a source of work and income, electing as priorities the qualification and formalisation of entrepreneurships, the creation of public spaces for products to be commercialised, access to special credit lines and the fostering of a metropolitan network.

R$6,000,000.00 (6 million reais)". *Source:* interview with the then Director of the Department for the Fostering of Solidarity Economy in February 2011.

[10] Available on http://www.fbes.org.br/. Accessed 9 March 2016.

[11] Available on http://www.fbes.org.br/index.php?option=com_content&task=view&id=8799&Itemid=62. Accessed 9 March 2016.

[12] Source: Ministry of Labour and Employment - Social Communication Advisory. Available on http://blog.mte.gov.br/trabalho/detalhe-2494.htm#.VuB0Z1uLTIU. Accessed 9 March 2016.

[13] Source: National Management Committee of SIES, 2009.

[14] Source: House Law Project no. 137/2017 - National Policy for Solidarity Economy. Available on https://www25.senado.leg.br/web/atividade/materias/-/materia/131528. Accessed 23 May 2021.

The Women's Solidarity Economy Network (RESF) is an illustration that combines the feminist economy and networking. Present in 9 Brazilian states, in 2012 RESF received an investment of R$4.5 million from the MTPS. It involved 25 networks comprising 1,936 self-managed female workers who thus benefited from solidarity collaboration and consequent gains in scale resulting from interconnections and synergetic articulations between entrepreneurships.

There is also a sectorial aspect that marks the federal and state policies of the solidarity economy. Law no. 11.947, of 16 June 2009[15] was emblematic in determining that at least 30% of the amount paid by states, municipalities and the Federal District through the National Education Development Fund for the National School Meals Programme must be used to purchase food from family agriculture or from traditional indigenous and quilombola communities.

Despite the intensity of the dynamics of the solidarity economy in Brazil, visible both in the number of entrepreneurships and in the legal and institutional configuration of the ecosystem marked by complexity, among other aspects, motivated by the presence of the multiple organisational actors that integrate it[16], there is still some discrepancy between this participatory organisation and the way in which the grassroots individuals and communities effectively live the solidarity economy on a daily basis. It seems to us that, very often, these people who form the basis of the functioning of the solidarity economy are far from an ideological position of struggle against the hegemonic economic philosophy and from a conscious strategy of exercising an alternative economy, whether in terms of production or consumption, but are only aligned with the search for an activity that guarantees an income that allows their survival and that of their families. It does not seem to be a movement led by vulnerable populations, although there are many activists in civil society but with a comfortable status in the socio-professional hierarchy. We are referring in particular to people linked to the academia, whether professors, researchers, technicians or students who choose the solidarity economy as an object of work also as a

[15] Available on https://www.fnde.gov.br/fndelegis/action/UrlPublicasAction.php. Accessed 24 March 2016.

[16] Among the organizational actors are the representatives of FBES and the Local Forums or the Solidarity Economy Councils; the CNES; the Network of Public Managers; the support and fostering entities, such as the trade union movement, non-governmental organizations (NGOs), civil society organizations of public interest (OSCIPs), churches and social pastorals and the ITCPs; the Leagues and Unions as representatives of the various types of entrepreneurships.

result of state incentives that finance the salaries of these professionals whose mission is to empower vulnerable populations.

From 2019, the solidarity economy suffers a strong blow with the election of Bolsonaro as president. With the abolition of the Ministry of Labour, which guaranteed dialogue between labour and capital since 1939, SENAES was merged with the Ministry of Citizenship and its competencies were restricted to social assistance and income policy. This reorganization removes the role of the *Solidarity Economy as a development strategy and policy*, theme of the 1st National Conference on Solidarity Economy in 2006, even though CNES has been preserved (Law 13.844/19).

Solidarity economy entrepreneurships with strong grassroots participation remain, as they have long trajectories and tend to have their own dynamics, but the future is uncertain, funding has decreased and the legal-political framework for fostering is in a phase of regression. In June 2019, according to SIES, there were 19,708 entrepreneurships bringing together almost 1.5 million associates, in 2,804 municipalities, and estimated to move R$12 billion per year (Pinho, 2019).

3.2. The Catalan Solidarity Economy asserted by grassroots movements and consolidated by municipal policy

The Catalan solidarity economy emerges from neighbours' and neighbourhood movements. In Barcelona, citizens are the main responsible for energizing the ecosystem of solidarity economy. Here grassroot activism is very strong whereas the Spanish national political-institutional configuration is possibly weaker than the Brazilian one, but robust and vigorously present in the sphere of local public power, both in the autonomous government of Catalonia and in the municipality of Barcelona.

The movement includes a strong presence of grassroot activists, including various associations, initiatives in self-managed spaces, citizens united by various causes, some more collective, others more individual, some formalised, others informal. Examples are anti-eviction movements, urban gardens, self-managed consumption groups and their producers, local neighbourhood markets, self-managed collectives, multiple local social currencies and work cooperatives.

The roots of these initiatives go back to the industrial cooperativism of the 19th century, whose importance made it an unavoidable socioeconomic mark of the city of Barcelona. Such a mark is decisive of the current revival of cooperativism in new moulds,

which we call grassroots, as opposed to the cooperativism that degenerated into a capitalist business functioning. These traditional marks are present today both in the speeches of activists and in the autonomous government itself. Regardless of their ideological position, the different Catalan governments have tried to keep this distant past alive by bringing it to the agenda. There is in fact a cooperative economy with an institutionalised tradition, which has a recognised *status quo* and a structure legitimised by local and regional political power. In the common autonomous government of Catalonia there is always a General Directorate dedicated to the social and cooperative economy.

The cooperative economy, namely its representative structures (such as the Confederation of Cooperatives of Catalonia (CCC), the Federation of Worker Cooperatives of Catalonia (FCTC), APOSTA SCCL – Cooperative Business School, the Seira Foundation – Financial Support for Cooperatives, the Fundació Roga Galès, among others) with the capacity of dialogue with the autonomous government of Catalonia, coexists with other types of achievements promoted by more recent generations of actors who seek to lead alternative practices to the traditional cooperative movement, and who accuse it of being strongly linked to the established power. However, they do not fail to recognise their inspirational roots of the current grassroots cooperative movement in the traditional cooperative movement, an inheritance they do not renounce. However, they create new representative structures capable of proposing alternatives within a transforming paradigm, among which the *Xarxa d'Economia Solidària* (Solidarity Economy Network) of Catalonia stands out due to its lobbying role and its regulatory intervention.

The strength of the old cooperative economy and its alliance with the current social and solidarity economy is visible, especially when, more recently and as a result of the May 2015 local elections, a *Comisionado de Economia Cooperativa, Social e Solidária e Consumo* was created in the Barcelona City Council. It is also visible when we find among the activists of the solidarity economy, children and grandchildren of cooperative workers who arrived, in the first half of the 20th century, from the most underprivileged areas of the country, namely Galicia and Andalusia, searching for a job. They are, therefore, second and third generations of actors, some of whom have intense contact with the cooperative spirit, either through their parents' cooperative experiences, or because some have already had a school education in cooperative schools, and are, therefore, socialised with cooperative principles and values.

The solidarity economy seems to be gaining preponderance anchored in grassroot movements, in turn supported and driven by a local political-institutional top structure. Despite the call for the three branches of the cooperative, social and solidarity economy to the *Comisionado*, there is a strong presence of the solidarity economy.

This tendency to privilege the solidarity economy path is translated into the adoption of the "14 measures for a municipal economic democracy"[17] and into the consequent creation of the Intermunicipal Network for the Solidarity Economy, a measure integrated in the draft Law on Social and Solidarity Economy (LESS) (2015), authored by Xes, in response to the request of the Catalan Parliament.

In 2015, the Intermunicipal Network included 20 municipalities representing more than 40% of the Catalan population and follows one of the proposed lines of the Xes'[18] Creation Manifesto which, in the context of the crisis, considers the social and solidarity economy as "a new territorial development model that better mobilises endogenous resources and prioritises the social, environmental and human dimensions of the economy, in order to effectively meet the needs of citizens".

XES was created in 2002 with a transformational perspective reflected in its Manifesto with the slogan "For an economy serving the people. Another world is possible" (Xes, 2002)[19]. Its role in Catalonia is identical to the role of FBES in Brazil. It expresses an anti-capitalist vision on a global scale. It is not only an economic project, but a new project of society, which integrates the international movement that is at its origin, particularly the Global Network of Solidarity Socioeconomy founded in 2001 as a result of the World Social Forum in Porto Alegre - Brazil.

The Xes' Manifesto states that "the term solidarity economy [...] designates the subordination of economy to its purpose, which is to provide, in a sustainable way, the material basis for the personal, social and environmental development of human beings". It thus diverges from conventional business organisations and the traditional cooperative movement, proposing itself as a lobby organisation and a laboratory, which integrates formal and informal groups, enterprises and entities "where each day new ways of working, consuming and investing are being tested, and which demonstrate to all those who want to see that it is possible to make companies efficient, and equally democratic, equitable and sustainable"[20]. Some actions triggered by Xes resemble what has been the

[17] Available on http://www.xes.cat/docpdf/xsd1073.pdf. Accessed 23 March 2016.
[18] Source: http://www.xes.cat/docpdf/xs0001.pdf (Xes, 2002). Accessed 13 March 2016.
[19] Available on http://www.xes.cat/docpdf/xs0001.pdf Accessed 13 March 2016.
[20] Available on http://www.xes.cat/pages/xs110.php?i=1. Accessed 14 March 2016.

solidarity economy movement in Brazil, which is oriented towards the intensification of cooperative relationships between people and organisations, in order to intensify the mesh of the network of intercooperation. We refer in particular to: i) the regular meetings of intercooperation networks that bring together associated producers in spaces for product display, where workshops aimed at interknowledge are held; ii) the Annual Fair of the Solidarity Economy that, in addition to fulfilling the functions of interknowledge among peers, has a main mission of displaying products and services and their commercialisation, being a space of establishment of the vitality of the sector; iii) and also Pam a Pam, a location map that signals, from an audit process, alternative entrepreneurships guided by the principles of responsible consumption and solidarity economy. The map, on which each organisation has a website, is available in a website format and a mobile phone app and can be consulted according to two cross-criteria, sectors of activity and regions of Catalonia, allowing anyone a conscious consumption option.

Also in Barcelona, the solidarity economy is presented as an assumedly feminine project, where affective rationality has a clear place in claiming the integration of the dimensions of proximity, care and affection, the attributes of the feminine gender stereotype, in economy. This feature is very present in the functioning of the organisations, where there is, for instance, 52.1% of female workers in the cooperatives (Fernàndez & Miró, 2016), but above all, there is a clear concern with gender equality, which is materialized in the existence of a female representative in various instances, such as in reflection spaces or in management bodies. The Feminist Economy Commission as a central working group in the Xes organisation reveals this trait.

The vitality of grassroot initiatives is also associated with a neighbourhood life and with an identity that is operationalised in strong interaction between neighbours who get together in assemblies to find solutions to problems that concern them and that have no answer from the State or from the market. This seems to be a practical community activism oriented towards the resolution of collective problems, deeply rooted in the neighbourhood life. This feeling of belonging to the neighbourhood and the resulting neighbourhood identity seems to be determining for the activism that we find in Barcelona and that has been manifested namely in the revitalisation of the various Athenaeums that exist in the various neighbourhoods of Barcelona. They are generically spaces where neighbours meet and for the community enrichment of people and groups. They are attended mainly by young people, but also by unemployed adults, often

democratically managed in a General Assembly. They are organised in various working groups, working in areas of interest such as education, employment, conscious consumption, culture and they develop activities for the benefit of their members. Social transformation and social and solidarity economy appear on their agendas, as well as the operationalisation of public employment and training programmes, dinners to collect donations for common causes, alternative markets for clothing or products from urban gardens.

In the city of Barcelona there is a 'natural' and intentionally created ecosystem for the emergence, development and maturation of another type of alternative economy to the capitalist economy. This ecosystem makes it possible to live on a daily basis in almost exclusive contact with organisations from this field. There is an abundance of practical and symbolic alternative accomplishments to the current economic model where a plurality of structures and actors interact and take on distinct roles and functions, besides having equally different convictions by being linked to cooperativism, to the social economy or to the solidarity economy. Intense participation in the movement is often associated with professional integration in the sector, as well as dedication to voluntary activities that result in overloading these people. This leads us to wonder how these people can in practice embrace the premises of sustainable consumption, that is, to what extent do they acquire and consume products from the solidarity economy that are geographically dispersed and have high costs. Although there is a considerable network of products available, they are rare in some sectors, such as health, and require a financial availability above the average of the same products offered by the market. Therefore, the question arises as to who is dynamizing this alternative economy in the market and who has access to it, knowing that from the point of view of social and cultural dynamization it is a movement started by classes with strong critical power towards capitalism and, therefore, with cultural capital (intellectual and educational) that allows them this reflexive awareness. Here we may be facing a scenario of inconsistency between ideology and practice for reasons related to the unavailability of money and time to access this type of consumption, and the consequent distancing from the mission of transformative economies by failing to meet their goals of social integration through the responsible consumption of the most vulnerable populations. These are some of the contradictions that reveal the weakness of this alternative economy in ensuring its true mission and sustaining its course.

The tradition and the weight of the cooperative economy in Catalonia justify that this economic branch is the target of attention of the autonomous government with programmes to support and incentive its development, being assumed as a priority line of action that aims to continue to foster the cooperative movement. The government organises, in partnership with the sector's representative organisations, campaigns in favour of the sector, creating, for instance, a website and an online directory on the social responsibility of cooperative economy enterprises. More subtle, but equally present, are the more reformist proposals in the scope of entrepreneurship and social innovation which are highly oriented towards the promotion of social business (Yunus, 2002) with a strong focus on the creation of economic value and, therefore, far from the activist ideology of participation, empowerment and self-management of the solidarity economy. This positioning of the autonomous government of Catalonia is much closer to the configuration of the Spanish social economy as envisaged within the Social Economy Law [21]of 2011 or the proposals of the Business Confederation of the Social Economy (CEPES), which position the social economy organisations as allies of the current economic and social paradigm, given the opportunity to mobilise civil society to create organisations directed towards unmet needs, to generate employment and to grow in a context of crisis even if much through the influence of financing social action policies.

This reformist posture that we find in Spain is the one that has more impact in Portugal, not only within the scope of the government's own options, but also at the level of public opinion.

3.3. The emerging Portuguese solidarity economy

Portugal is, of the three experiences under analysis, the one where the equation and debate on the solidarity economy as a path of transformation is the most recent and the mildest in its positioning of rupture with the hegemonic capitalist logic.

The speeches on entrepreneurship and social innovation are those that are having the highest public visibility and that find the widest dissemination in the media. The Basic Law of the Social Economy, approved in 2013, makes no reference to the solidarity economy, a concept that was rejected early on within the group qualified to prepare it.

[21] Source: Available on https://cases.pt/wp-content/uploads/projecto_Lei_Economia_Social.pdf. Accessed 24 May 2021.

The Portugal Social Innovation Programme[22], within the scope of Portugal 2020, is a good example of the governmental guidelines in this domain. The programme, aimed at solving important societal problems, aims to develop and dynamize the social investment market to support initiatives capable of "generating new solutions, in a complementary logic to traditional responses". In Portugal, the social economy sector is a strong instrument of the Welfare State and its call through this Programme seems to be the result of "the incapacity or the emptying of the traditional roles of the Welfare State and of a disordered transfer of these roles to the social economy sector. This now ceases to have a role restricted to the provision of services according to the regulations imposed by a dominating State with little dialogue, in order to also take on a role as a promoter of innovative solutions" (Parente, Marcos and Quintão, 2016) according to private market criteria. The entire resolution has the implicit perspective of the American non-profit sector and its two main Anglophone schools of thought, the earned income school and the social innovation school, without any collective-based tendencies, a characteristic that we find in the European social and solidarity economy, where proximity economy, articulation with the location, territorial networks, participation and self-management are the key words within the transformation projects understood, not only as results, but fundamentally as empowering and autonomising processes that place people at the centre of the economy and society (Parente, Marcos and Quintão, 2016).

Despite the legal recognition, right from the 1976 Constitution of the Republic, of the social and cooperative sector alongside the State and the private profit sector, little or no importance has been given to the new cooperatives or grassroot cooperatives in Portugal, that is, to the new social economy. The social sector embodied by the Private Institutions of Social Solidarity and as the practical executor of social policies prevails. Cooperativism has been perpetuated in its most conventional form, which has been tampering with its democratic management principles, namely with the recent amendment to the cooperative code[23] which creates, in article 20, the figure of the investor member as someone who is admitted to the cooperative by subscribing to investment securities or equity capital and who as an investor member may have the right to a multiple vote as

[22] Resolution of the Council of Ministers No. 73-A/2014, 16 December 2014. Available on https://www.portugal2020.pt/Portal2020/Media/Default/Docs/Legislacao/Nacional/RCM%2073A_2014.pdf. Accessed 24 March 2016.

[23] **The** new Cooperative Code published in Law no. 119/2015 of 31 August revoked the previous diploma **(**Law no. 51/96 of 07.09**).**

defined in article 21. If, on the one hand, the figure of the investor member distorts the reasons for subscribing to a cooperative, which are no longer centred on the sharing of cooperative values, limiting the member to the condition of investor, on the other hand, the possibility of multiple voting (if established in the statutes) and even if subject to clear limitations, undermines the democratic principle of "one person, one vote".

The António Sérgio Cooperative for the Social Economy (CASES), which resulted from the conversion, in 2009, of the António Sérgio Institute for the Cooperative Sector (INSCOOP) - a public institute created by the Portuguese State in 1974, after the establishment of democracy, to promote and develop the cooperative sector - broadened its spectrum of representation to the entire social economy, but to this day has not included any representative of the grassroot or solidarity economy. The local development movement, organised since 1993 in ANIMAR - the Portuguese Association for Local Development – represented in CASES, is the closest to a representation of the practices of the solidarity economy. At first, its expression took place above all in rural contexts and then extended to the entire national territory, although the local development associations (ADL) never had their own legal status in Portugal. Some ended up being constituted as intermediary agencies for the management of community programmes and respective financing, while others combined this function with that of IPSS in order to benefit from access to public financing. These Associations did not always achieve their mission of promoting processes of local change that imply the satisfaction of community needs and the improvement of their quality of life, according to a logic of partnership and an integrated approach, combining components and areas of intervention (Amaro, 2005), not constituting themselves as a grassroot movement of the territories.

Unlike the case of Brazil or the Catalan experience, where the solidarity economy exists not only as a social movement, but also from an institutional and political-legal point of view, in Portugal this proposal has not been envisaged in the generality of Portuguese society as an alternative path in the creation of employment and income from work, nor has it been considered within the scope of public policies as a way of facing economic and social crises and, far less, as an alternative society project. However, since the 1990s, there have been some pioneering experiences, of which Azores stand out regionally, "of what should be another Economy, compatible with the sustainability of Life on the Planet", having been intensified from the beginning of the new century the associative initiatives, small cooperatives, networks, communities and informal groups, often dynamized by young people and adults from developed Europe, who seek to work and live according

to the principles of the "other economy". It is from this movement that the Portuguese Solidarity Economy Network (RedPES) was created in 2015 as a platform for affirmation capable of "bringing together organisations and other legal persons (formal or informal) and individuals who are identified with the concept and practices of Solidarity Economy", understood as "the formal or informal processes of production, exchange, consumption, distribution, income generation, savings and investment, which combine Solidarity Economy, Ecological Perspective, Cultural Diversity, Critical Reflection, Participatory Democracy and Local Development"[24].

In its Manifesto, RedPES proposes to contribute to defining and strengthening the identity of the solidarity economy, to assert and foster its recognition in society, to diversify its knowledge base, integrating academic knowledge with other types of knowledge in the foundation of the solidarity economy. These proposals of RedPES are more at the level of the foundation of the concept and practices with the objectives of clarifying, informing and creating a practical and reflective cognitive identity, rather than at the level of action, an area of less investment in a still incipient phase of the creation of RedPES, and in which the contribution to the strengthening and empowerment of organisations and groups is generally considered[25]. Despite its scarce existence and a path that has to be built, in early 2016, RedPES drafted an opinion on a law project on "Local Food Products in Public Canteens and Cafeterias" for the Committee on Budget, Finance and Administrative Modernisation. It is the first stand taken, where it states that the opportunity of the social and solidarity economy to foster the values of food sovereignty and local development depends on "a set of complementary mechanisms" to support and stimulate "family production and micro and small enterprises [...] with the development of initiatives that promote contact and relationships of trust between production and consumption, between producers and consumers, seen as coproducers and coactors in a joint and collective process of coactivity [...]". Otherwise, "the results will not be the desired ones and the objective of fostering the usage of local products could be completely devalued and favour, directly or indirectly, the big operators of the agri-food chains".[26]

However, RedPES has shown a weak associative internal dynamism, as well as in terms of action proposals, not broadening its recruitment basis, nor renewing its leaders.

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[24]Available on http://www.redpes.pt/a-redpes/. Accessed 20 March 2016.

[25] Available on http://www.redpes.pt/sobre/. Accessed 29 March 2016.

[26] RedPES' opinion on law projects of the parties PEV, BE, PAN and PS about "Local Food Products in Public Canteens and Cafeterias", sent to the Committee on Budget, Finance and Administrative Modernisation. February 2016.

The programmes for fostering and developing the social and solidarity economy , one of the pillars of the country's economic and social development, have been created and managed by CASES. Among them are *Geração Coop*, *CoopJovem* and *Social Investe*.

The *Geração Coop* project[27] aims to disseminate the cooperative enterprise model "as an active model to build a better world". It has a strong orientation towards awareness and enlightenment communication, with educational tools that teach how to form a cooperative, give tips on cooperativism, deconstruct ideas, present cooperative enterprises around the world and testimonials from Portuguese cooperativists. *COOPJOVEM*[28] is a programme to support the creation of cooperatives for young people aged 18 to 29, offering grants for project conception, technical support in the area of cooperative entrepreneurship, financial support for the creation and installation of the cooperative and access to subsidised credit. *SOCIAL INVESTE*[29] is a credit programme, under a protocol signed by credit institutions with CASES and IEFP, which aims to facilitate access to financing by social economy organisations. The credit benefits from a guarantee under the mutual guarantee system, an interest rate subsidy and a subsidy from the guarantee committee under the terms of the protocol with the Mutual Guarantee Societies. This is one of the great limits pointed out by the actors of the social and solidarity economy because all the phases of the process and the evaluation parameters are based on business criteria, given that the credit entities involved are profit-maximising enterprises, whereas it would be desirable for them to be restricted to social economy organisations and the State, excluding market logics, as happens both in Brazil and in Barcelona, where the financial system has ethical and solidarity finance organisations. The existence of these alternative finances is the most complete proof of a rupture with the principles of the capitalist economy, questioning its status quo and the naturalisation that they are the object.

4. A balance for the future

"And each day, the cracks in capitalism will themselves continue to impede its own sustainable reproduction, while the solidarity economy will follow its own path of economic emancipation of humanity" (Mance, 2008). Thirteen years after Euclides Mance's statement in his somewhat visionary work, "*Constelação Solidarius*" (Solidary

[27] Available on http://www.geracaocoop.pt/. Accessed 30 March 2016.
[28] Available on http://www.cases.pt/programas/coopjovem. Accessed 30 March 2016.
[29] Available on http://www.cases.pt/programas/social-investe. Accessed 30 March 2016.

Constellation), in which he believed that the solidarity economy would be imposed via collaborative platforms enabled by information and communication technologies, we observe, through the three experiences analysed, how difficult it has been for the social and solidarity economy to make a solid path from the point of view of its political-institutional statement, even when the hegemonic capitalist model is constantly proving its exhaustion.

Reproduction is a social tendency much more powerful than radical rupture or gradual change. Any change, regardless of the incidence domain, makes its way very slowly. This path is slower in the economic field, where power and domination relationships, as well as vested interests, are the essence of its functioning founded on individualistic and conservative values. In the three contexts analysed, we always find proposals for transformation that are more aligned with the current economic model and others that are more progressive and alternative. Among the most aligned proposals is the non-market subsector of the social economy (Monzon & Chaves, 2008), dependent on the State and executor of its social policies. In Brazil it is embodied in the civil society organisation of public interest (OSCIP), in Barcelona by the Catalan social third sector that integrates associations, foundations and cooperatives of social initiative and is represented by the Spanish Business Confederation of the Social Economy (CEPES) and in Portugal by the IPSS, represented by the National Confederation of Solidarity Institutions. Being constituted as central actors in the implementation of the State's social policies, they take on different expressions in the three countries, stronger in Portugal and Spain than in Brazil.

In turn, among the most progressive political-institutional proposals we have already had Brazil at the top of them, on a double foundation simultaneously bottom-up and top-down, with strong governmental support that elected the field of solidarity economy as national public policy in 2003, but today in a situation of clear regression due to the presidential options. It is in Barcelona that we currently find the strongest anchor of the grassroot movement in terms of municipal policies, which reinforce the legitimacy of the field and foster its development. The municipality, in a process of coparticipation with enterprises and organisations of social and solidarity economy, has been coordinating the strategy of the social and solidarity economy 2030 for the city. Entitled "Reactivation and strengthening of an economy for the city life", to be launched in July 2021, it includes 73 enterprises and organisations, amongst them: grassroot collectives, top organisations (federations and confederations), associations, cooperatives, networks, schools, and so on.

In both cases, we find strong social and solidarity economy ecosystems, but with different legal and political structures. Stronger in Barcelona with grassroot actors - people, families, formal and informal groups - dynamic and active with cultural and social capital to be organised in alternative production and consumption activities. More fragile in Brazil where the political-legal superstructure is unfavourable and although the movement is already rooted and has an autonomous and sustainable trajectory, it will certainly be weakened, especially because the physical poverty and the low level of schooling and qualification of the population involved in solidarity economy initiatives do not provide a resistance to the logics of capitalist exploitation.

In Portugal, the ecosystem is fragile and disperse, accentuating movements aligned with a conservative proposal in the field of entrepreneurship and social innovation that responds to government policy that strictly complies with community directives, unlike the Spanish example in this particular field. The cooperative tradition in general, and the grassroot tradition in particular, does not seem to have many supporters, even though it was very strong after the 25th of April, in addition to being permeated by the ideology of private investment, although there are still good examples and growing. The grassroot movements and alternative practices operationalised in rural and neighbourhood communities, eco-villages, networks of people and organisations seem to lack the social density for structuring and daily practices and are still restricted to occasional and sporadic events.

In conclusion, we can state that if in Portugal recently the first steps towards an alternative path are being taken, in Barcelona "another economy already exists", while Brazil requires us to be alert to understand to what extent the grassroot movement is sufficiently resistant and empowered to remain alive and active against the neo-liberal offensive. It is clear that, on the one hand, the strengthening of the solidarity economy as a field of solutions in question to crises depends on the advances and regressions of policies; however, on the other hand, we believe that the trajectory is built in this back and forth that allows us to occupy the systematic cracks in capitalism.

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