The BC-Alberta Social Economy Research Alliance

Mapping the Social Economy in British Columbia and Alberta: Trends, Patterns, New Directions

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Abstract

The BC-Alberta Social Economy Research Alliance (BALTA) is collecting information on the scope and scale of the social economy in British Columbia and Alberta. As part of this research endeavor, the BALTA Mapping project conducted an online survey in 2008. This paper provides a first snapshot of the social economy in British Columbia and Alberta based on information collected with the BALTA mapping online survey. It reflects on research decisions and identifies some challenges in surveying the sector. While the mapping project is ongoing, data collected so far illustrate the diversity of the sector and underline its importance for individuals, communities and the economy. The paper sets out some preliminary patterns and provides analysis of the role of the sector as it impacts gender and minorities, its engagement with market practices and the emergence of the environment and sustainability as a social economy mission and practice.

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Introduction

The BC-Alberta Social Economy Research Alliance (BALTA) [1] is a regional alliance of academic institutions and community based organizations whose mandate is to conduct research on the social economy with the objectives to both increase knowledge about the sector and identify ways to strengthen and expand the sector in western Canada. In January 2008, BALTA launched a social economy online survey aimed at identifying the scope and scale of the social economy in British Columbia (BC) and Alberta including evidence of its economic, social and environmental significance. Design and implementation of the mapping survey was guided by a number of objectives including:

1. to compile an inventory of social economy actors and organizations in BC and Alberta that illustrates the scope and scale of the sector;
2. to categorize and survey social economy organizations in order to understand the characteristics, structure and function for the social economy and its actors;
3. to provide information to BALTA members for research and analytical purposes;
4. to identify trends, patterns, gaps and opportunities for scaling up within the sector as well as opportunities for case studies and future research;
5. to provide data and information relevant to practitioners, academics and policy makers for the purpose of strengthening the foundations of the social economy in BC and Alberta;
6. to provide tools to participating organizations that will allow them to build up support and information networks.

The online survey can be accessed online from the BALTA mapping website (http://www.socialeconomy-bcalberta.ca/mapping.html) and will stay active throughout the duration of the project. The survey covers a broad range of questions on the scope and scale of the social economy in the two provinces.

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[1] BALTA is a five-year project (2006-2011) funded by the Social Sciences and Humanities Research Council of Canada. It is led by the Canadian Centre for Community Renewal. Academic partners include Athabasca University, Royal Roads University, Simon Fraser University, University of Alberta and University of Victoria. Community partners are the Alberta Community and Cooperative Association, ASPECT, BC Co-operative Association, Canadian Community Economic Development Network, City of Edmonton Community Services, Edmonton Community Foundation, Enterprising Nonprofits Program, Mennonite Central Committee of B.C., Native Brotherhood of B.C. and Rural and Co-operatives Secretariats, Agriculture and Agri-Food Canada. Other academic institutions and community organizations are involved through participating BALTA researchers and members.

This paper discusses research decisions made regarding the development and implementation of the survey and provides a brief overview over the information collected during the first year of operation (January to December 2008). The following section of this paper sets the mapping survey into context providing definitions of the social economy and linking the project to other research initiatives in the field. The third section of the paper provides information on the research decisions made in respect to design and implementation of the survey. The discussion of survey results provides a snapshot of the scale and scope of the social economy sector in BC and Alberta. The paper concludes with recommendations for future research and next steps of the BALTA mapping project.

Mapping the social economy

One major challenge of portraying the social economy in Canada is that no universal or commonly accepted definition exists as to what and who constitutes the social economy. A nascent field, its analysts offer various definitions that attempt to capture the essence of the sector. For example, Social Development Canada (2005) defines the social economy as "grass-roots entrepreneurial, not-for-profit sector, based on democratic values, that seeks to enhance the social, economic, and environmental conditions of communities, often with a focus on their disadvantaged members". Western Economic Diversification Canada (2007) defines the social economy as "An entrepreneurial, not for profit sector that seeks to enhance the social, economic and environmental conditions of communities". Similarly, Economic Development Canada (quoted in Canadian Co-operative Association 2005) describes the sector as one that "produces goods and services within the context of the market economy, but whose aim is to redistribute surplus in support of social and community objectives".

For the purposes of the BALTA project in general and BALTA mapping in particular, Lewis (2006) uses Restakis (2005) and Pearce (2003) as a point of departure for defining the social economy. Restakis (2005) provides the following definition: "Social economy organizations are those organizations whose members are animated by the principle of reciprocity for the pursuit of mutual economic or social goals, often through the control of social capital". This definition includes all cooperatives, credit union, nonprofits and volunteer organizations, charities and foundations, service associations, community enterprises and social enterprises that use market mechanisms to pursue explicit social objectives. For profit enterprises are included only if surpluses are mutually shared by members in a collectively owned structure such as in cooperatives or collectives. State institutions or programs, and conventional capitalist firms such as sole proprietorships, partnerships and investor owned or publicly traded companies are not covered by this definition (Restakis 2005). Pearce (2003) refers to the social economy as the "third system" of the economy that consists of "citizens taking action to meet and satisfy needs themselves and working together in some collaborative way to do this". In order to sketch boundaries for the BALTA mapping project, Lewis (2006) draws on Pearce's (2003) definition but further confines the sector, for simplicity and clarity, to the parts of the third system that engage in market activity. However, even though many organizations are driven by the principle of reciprocity, not all engage in market or trade related activity.

Defining the social economy is clearly not straightforward. Any definition will have limitations particularly where boundaries are blurred. For example, using specific legal forms of organizations as criteria for inclusion (or exclusion) will draw clear lines but also lead to a number of problems. Focusing on the legal form rather than the function or purpose of organizations will lead to certain misrepresentations, for example, when for profit institutions are excluded even though some for profit corporations may distribute all their profits to charitable organizations. Accepting all cooperatives by virtue of their legal form, on the contrary, may include organizations that, as many may argue, cannot be considered as part of the social economy per se as the often mentioned example of Mountain Equipment Co-Op illustrates.

This definitional challenge is found in most recent research initiatives profiling the social economy in Canada. Most studies take different definitions and starting points and develop their own selection criteria and measurements to define the social economy. The 2003 National Survey of Nonprofit and Voluntary Organizations (NSNVO) conducted by a consortium of organizations and led by Imagine Canada is described as providing "the first national portrait of the many thousands of nonprofit and voluntary organizations that are the cornerstone of Canadian communities"(Hall et al. 2005, 8) "that form the social glue that holds our communities together" (Roach 2006, 1). The NSNVO was administered by Statistics Canada and included information from over 13,000 participating organizations representing the more than 161,000 estimated nonprofit and voluntary organizations operating in Canada (including over 19,300 from Alberta and 20,270 from BC). The Imagine Canada study on nonprofit and voluntary organizations used five criteria to identify organizations namely, (1) non-governmental; (2) nonprofit distributing; (3) self-governing; (4) voluntary and (5) formally incorporated or registered under specific legislation (Hall et al. 2005). The Canada Research Chair of the Social Economy, in comparison, used a different set of criteria for its profile of the social economy of Montreal including (1) carrying on an economic activity; (2) social rules prohibiting or limiting distribution of surpluses among members; (3) voluntary association of persons; and (4) democratic governance processes (Bouchard et al. 2006).

Based on Lewis' (2006) definition and in accordance with the qualification criteria used by the Canada Research Chair of the Social Economy, the BALTA social economy survey uses four binding and two optional (*) criteria that organizations should meet to qualify as part of the social economy. Organizations need to (1) have an explicitly stated social and/or environmental purpose/mission; (2) achieve social/environmental purpose(s) by engaging, at least in part, in trade-related market activity; (3) be accountable to a defined constituency; (4) reinvest surpluses back into the community or into the organization/enterprise for the purposes of achieving social/environmental goals; (5) not distribute profits to individuals* and (6) engage in democratic governance*.[2]

Survey development and research decisions

The design and implementation process of the BALTA social economy survey consisted of the following three tasks: (1) development of an online questionnaire aimed at capturing basic information regarding who constitutes the social economy in BC and Alberta; (2) identification of potential survey participants and generation of a contact list of the sample population and (3) recruitment of participants and administration of the survey.

[2] Taking into consideration the blurred boundaries of the social economy that often appear as grey zones rather than as clear lines, we are currently developing a sliding scale where organizations are evaluated based on the total points they score using a number of criteria rather than eliminating organizations that fail to meet individual criteria.

Drawing on general literature regarding survey design and implementation (Dillman 2007), mapping surveys from other Canadian research nodes (Atlantic, Northern Ontario, Manitoba, Saskatchewan, Southern Ontario, Northern Canada) as well as research conducted in the UK (Blanc et al. 2001, the Guild 2001, Department of Trade and Industry 2001, ECOTECH 2001) the BALTA mapping questionnaire was designed around several theme areas including basic contact information, geographic range, stated mission and objectives, organizational and legal structure, employment, financial information, support functions and networking resulting in 26 questions. Before the survey launch in January 2008, the questionnaire was tested by the research team as well as a number of selected organizations to improve and ensure clarity of content and usability of online tools.

Due to the heterogeneity of definitions and approaches used, no comparable database of the social economy in Canada is available. One of the major challenges of the BALTA mapping project has been to identify organizations located and/or operating in BC and Alberta that meet the BALTA social economy definition and to compile a contact list (database) of these organizations. A number of factors complicate identification of the sampling population. First, the total sampling population is unknown, as the sector hasn't been profiled in its entirety before. For this reason the NSNVO excluded organizations that are not formally incorporated or registered with provincial, territorial or federal governments because of the "substantial difficulties identifying and locating them" (Roach 2006, 4). Second, the targeted population does not necessarily identify with the social economy, as the concept or descriptor is not often used by practitioners. The term itself is fairly new. Finally, gathering contact information was limited by the human and financial resources available. Due to these restrictions we chose an opportunistic approach to include as many organizations as possible. To compile the database of organizations, a purposive sampling approach was chosen that would allow us to use BALTA member organizations, sector leaders and meeting venues to identify organizations within the sector. As Palys (2008) and Neuman (2004) point out, purposive sampling methods don't aim for formal representation but try to locate as many cases as possible using many different methods to identify members of the targeted population. Purposive techniques are often used for members of hard to reach, specialized or unknown populations. Further, we used snowball sampling, personal linkages and networks between BALTA members, their organizations, and other social enterprises to reach out to formerly unknown organizations in order to increase our sample size. While organizations included in the database were selected according to certain criteria, they don’t necessarily meet the BALTA social economy classification criteria introduced above.

All organizations identified as being part of the target population were contacted by email and invited to participate in the online survey. Reminders were sent about a week after initial contact. In order to increase the response rate and reduce attrition rates several strategies were implemented. First, participants were offered an incentive for filling out the survey before a certain date in the form of a $150 gift certificate. Second, the questionnaire was made available online as read-only version to allow individuals to preview the questions. Third, we announced and released provisional data reports (Summer 2008 and Fall 2008). Further, the survey was advertised by members of the social economy in newsletters, posts on websites and through list servers.

Trends and Patterns of the Social Economy in B.C. and Alberta

In 2008, 213 organizations operating in BC and Alberta filled out the BALTA social economy online survey (corresponding to a 13% response rate of the identified target population) of which only one reported to be located outside of the two provinces. According to the NSNVO, in 2003 there were over 39,500 nonprofit and voluntary organizations in BC and Alberta (Murray 2006; Roach 2006).

Due to the lack of available information regarding social economy organizations in BC and Alberta and the approach chosen to identify the survey target population, not all organizations included in the sample population and hence not all respondents necessarily meet the BALTA social economy criteria outlined above. Table 1 illustrates how the sample size changes when responses are sorted according to the criteria. About 87% of organizations declared a social and/or environmental mission therefore meeting the first criteria. When asked about their involvement in market-based transactions just under 60% of the sample remains, and after adding the third criteria (accountable to a defined constituency) only 39% of the sample meets the definition. But not all respondents chose to answer all questions. Identifying social economy organizations

Table 1: Survey responses meeting BALTA social economy classification criteria

BALTA social economy classification criteria	Number of respondents meeting criteria
Criteria I (social and/or environmental mission)	186 (87.3%)
Criteria I and II (involved in market based transactions)	126 (59.2%)
Criteria I, II and III (accountable to a defined constituency)	83 (39.0 %)
Criteria I, II and V (profits not distributed to individuals)	118 (55.4%)
Criteria I, II, III and V	77 (36.2%)

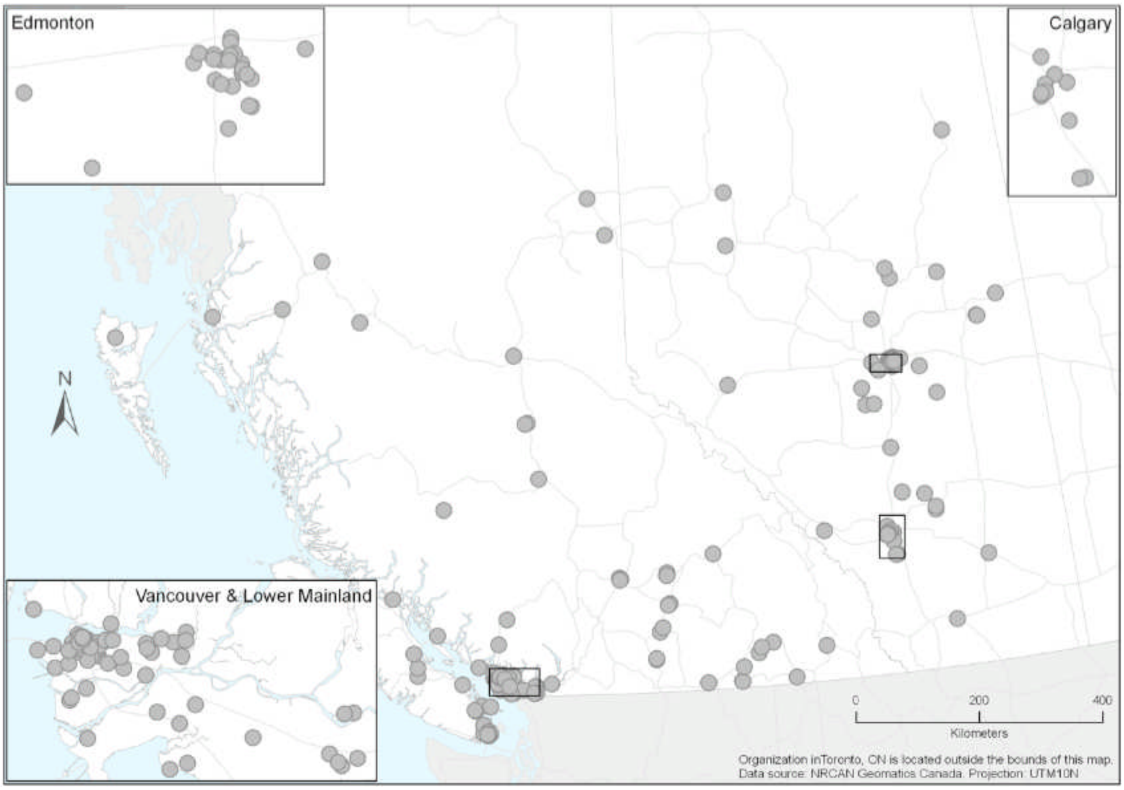
based on questions corresponding to the selection criteria excludes those organizations that did not provide an answer but may meet the requirements. After sorting through the gathered information, we felt dissatisfied with the four ‘hard’ criteria to determine who comprises the social economy in BC and Alberta, and who is out. Rather, we decided to look for a less rigid approach that would allow us to measure the degree to which organizations meet a number of social economy indicators instead of using indicators for inclusion/exclusion. This method could be used to distinguish between core social economy institutions (that meet all indicators) and marginally affiliated ones (that partially meet selected identifiers) reflecting the fuzzy boundaries of the social economy. We are currently in the process of identifying and weighing social economy measures.

The overview over the information gathered with the survey below includes all responses received in 2008 based on the assumption that by participating in the survey, organizations and actors identify or see themselves as part of the social economy.

Spatial patterns

The geographic distribution of social economy organizations roughly reflects population density patterns in BC and Alberta with four clusters around the urban agglomerations of Vancouver, Victoria, Edmonton and Calgary and a sparse but somewhat even distribution over the rural regions of the two provinces (Figure 1). The majority of respondents (86%) reported to operate one establishment and 21 (10%) indicated that their organizations have more than one branch or office. The number of branch establishments with distinct financial statements are generally small (two to three) with the exception of one organization with 500 locations.

Figure 1: Geographical distribution of organizations (*Design: C. Médard de Chardon*)



The social economy literature, particularly on community economic development, frequently emphasizes the local scale of operations of social enterprises. Loxley et al. (2007: 202), for example, emphasize the importance of backward and forward local linkages. Previous work in NSNVO has revealed a strong focus on the local with 62% of BC organizations and 74% of Alberta organizations serving the local municipality and 20% and 13% respectively working regionally within the two provinces (Murray 2006; Roach 2006). Our sample confirms the community focus of the social economy, even though it appears less pronounced than in the NSNVO (see Table 2). In respect to different spatial levels, the majority of respondents named the regional (49.3%) and sub-regional level (40.8% serve their town/city and 30.9% their local community or neighbourhood). Less than a third of organizations (26.8%) operate at the provincial level, while only 15.5 and 11.3% respectively are engaged on a national or international scale. When looking at all spatial scales that organizations serve, the majority focus on the provincial and sub-provincial level represented by 76.5% of our sample (Tab. 2, right columns). Just over half of all respondents (56.8%) indicated that their organizations operate on the regional and sub-regional level only, and every fifth organization solely serves its local community and/or town. Organizations that do not serve the local community but focus on the national and international level are less common. Only 8.5% specialize on the supra-provincial level, serving exclusively a national and international clientele.

Table 2: Spatial scale and range of operation, multiple responses (n=213)

Spatial levels of operation	Number of responses	Number of responses in %	Spatial range of operation (all spatial scales)	Number of responses	Number of responses in %
Local community	66	30.9%	Local community only	14	6.6%
City/town	87	40.8%	Local community and/or city/town	45	21.2%
Region (county/ district)	105	49.3%	Local community, city/town, and/or region	121	56.8%
Province	57	26.8%	Local community, city/town, region and/or province	163	76.5%
National	33	15.5%	Province only	26	12.2%
International	24	11.3%	National and international	18	8.5%
Other	*13*	*6.1%*	International only	9	4.2%

Organizational structure

Information regarding the age, legal form and membership base of organizations provide a first overview over the survey population. Even though our sample includes a number of long-established organizations that have been around for over 50 years (10% of respondents), the average age of 22 years indicates that most organizations are relatively young. The majority of organizations (72%) were founded in the last 30 years particularly in the late 1980s, late 1990s and mid 2000s. Bouchard et al. (2008) report a comparable average age of 19 years in their profile of the social economy in the Montréal region.

With respect to the legal form of their establishment, organizations could choose from a list (Table 3, left column) or provide information. Table 3 shows the number of responses for each category. About half of all respondents identified themselves as not-for-profit organizations (104 counts), one third as a society and 17% as not-for-profit corporations. Twenty-one identified as cooperatives. Several respondents provided additional information. Six identified themselves as charity/charitable status, four as university related, two as not-for-profit cooperative society and/or federation, two as coalition/network, one as administered by the local school district, one as not-for-profit cooperative society, and one as a for-profit managed as trust which feeds into a not-for-profit beneficiary.

Table 3: Legal form of organizations

Legal form	Multiple responses (n=213)
Not-for-profit organization	104
Society	68
Not-for-profit corporation	36
Cooperative	21
Other	14
For-profit-organization/corporation	10
Foundation	9
Association	6

Table 4: Organizations with membership base by size categories

Size category	Number of members (n=136)
0-26	26
26-50	21
51-100	16
101-250	32
251-500	17
501-1,000	10
1,001-5,000	6
5,001-100,000	6
Over 100,000	2

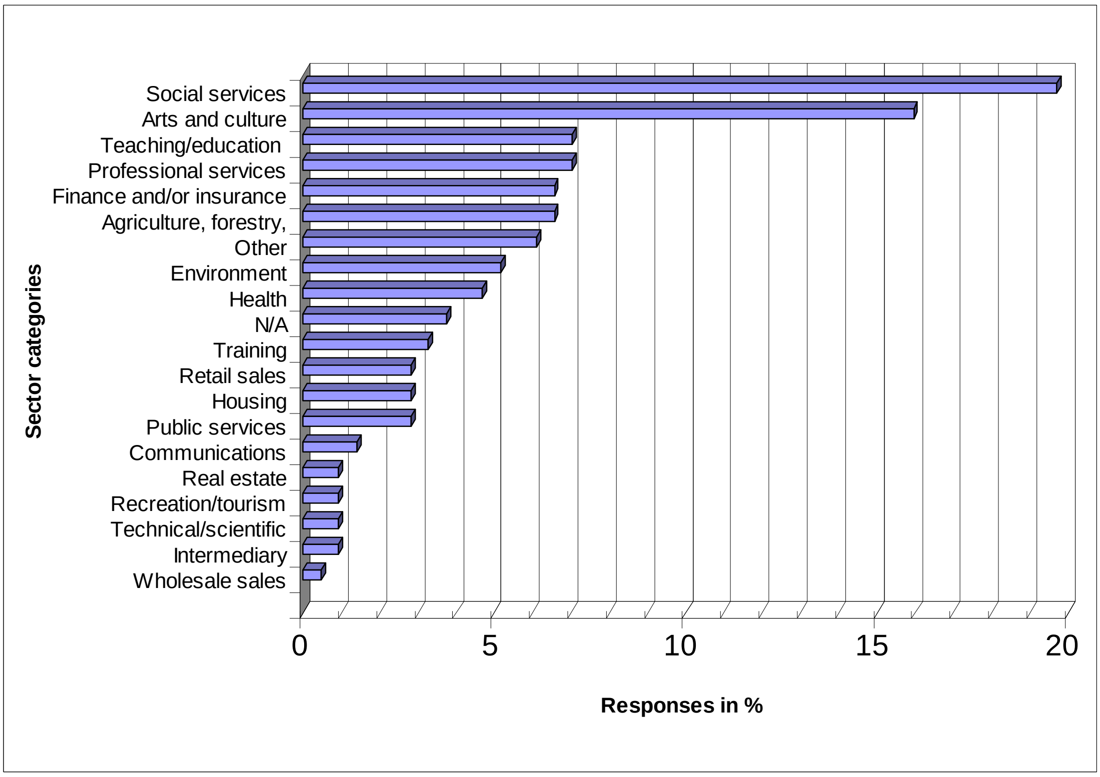
In terms of accountability to a defined constituency, two thirds of all organizations (141 counts) stated that their organization had a membership base and 136 specified the size of their membership. The total membership for our sample is 3,425,441. The number of members per organization, however, varies considerably between respondents ranging from four to 2.8 million (in the case of a non-financial cooperative) with a median of 117.5 members. As Table 4 shows, about half of all membership based organizations have less than 100 members and only 14 organizations reported to have over 500 members. To get a sense of the degree that organizations engage in democratic governance, the number of members can be compared to the number of persons on the board of directors, assuming higher representative participation with a smaller membership per director ratio. For the 136 organizations that provided information on the two variables, the mean ratio of members to board directors is 2705 but the high number is skewed by a handful of organizations with large memberships and limited board representation. As the percentiles show, 25% of organizations have a member-board director ratio of five to one, 50% of 13 to one and for three quarters of the organizations the ratio still lies at 30 members per board director – suggesting a fairly democratic governance structure for the majority of responding organizations.

Objectives of the social economy

In order to analyze social economy organizations according to their primary activity Bouchard et al. (2008) developed a classification system (meta-categories, categories, sub-categories) that combined insights from Canadian and Quebec surveys of the voluntary, non-profit, arts and culture, and cooperative sectors, with classification categories of the North America Industrial Classification system to provide a more sympathetic and internationally comparable classification system for examining the social economy. The BALTA mapping survey question asking for organizations' primary sector of activity is based on the second category or middle level of the classification system developed by Bouchard et al. (2008), while the NSNVO uses a version of the International Classification of Nonprofit Organizations customized for the Canadian context (Hall et al. 2005). Social economy organizations serve a wide range of different objectives touching on almost every aspect of life including, for example, social services, recreation and tourism, professional services, health, retail sales, communications, manufacturing, real estate and finance and insurance. As illustrated by Figure 2, the most common sectors identified by participants as primary areas include social services (20%), arts and culture (16%), teaching and education (7%), finance and insurance (7%), agriculture, forestry, fishing and mining (7%) and professional services (6%).[3] The relatively high number of respondents who chose 'other' suggests that the categories are insufficient or unclear or that respondents had difficulties making a selection. Results from the NSNVO based on a different classification system identified religion (19% in BC and Alberta) and sports and recreation (26% in Alberta, 17% in BC) as the most common primary fields of activity. However, arts and culture and social services were also well represented in both provinces with 10% and 9% respectively.

[3] Adjusted responses taking into consideration 'other' responses provided by respondents.

Figure 2: Primary sector of activity of organizations



Human resources

Unlike other economic sectors, the social economy is characterized by a significant proportion of unpaid staff. More than two thirds of organizations reported volunteers. Looking at the overall number of human resources, respondents stated that 59% of their staff were volunteers compared to 41% paid workers. Six percent of respondents reported that they rely solely on volunteers and do not have any paid workers (compared to 54% of the NSNVO sample), while 44% reported more volunteers than paid staff working for their organization. The BALTA social economy survey did not ask respondents to specify the number of volunteer hours worked, however, according to Human Resources and Skills Development Canada (HRSDC), 45% of all Canadians aged 15 and over volunteered approximately 2 billion hours in 2004 translating to an average of 76 hours per person annually (http://www4.hrsdc.gc.ca/.3ndic.1t.4r@-eng.jsp?iid=74). BC and Alberta both are above the national average with 90 hours and 79 hours annual volunteering time per person respectively. Of all volunteers, about 7% act as board directors of social economy organizations. In terms of the sectors that volunteers work in, by far the majority of volunteers provide social services, followed by arts and culture, and teaching and education, revealing similar trends as the nonprofit and voluntary sector that identified the areas of sports and recreation, religion, social services, grant-making and arts and culture (Hall et al. 2005).

While the work of volunteers is a defining characteristic of the social economy, the sector also creates employment, often targeting marginalized and disadvantaged groups (e.g., people with disabilities, homeless). Responding organizations reported a total of 10,177 employees including 6185 full time and 2125 part time employees. In terms of employment size, small organizations[4] by far dominate the survey population. Sixty percent of organizations have less than 20 employees. One quarter of organizations stated that they employ target groups. Of those 54 organizations that employ target groups, 51 provided information on number and gender of target employees. There were 832 target employees, roughly 65% women. The number of target employees per organization varied considerably, between one and 130 employees. The numbers suggest that women are privileged target employees: more than half of the organizations hired more women than men and only 17% hired fewer women than men.

Social economy organizations do not only provide economic and social support through employment to otherwise disadvantaged persons. Many provide support to other organizations in the form of networking, capacity building, training, advocacy and promotion as well as technical (40%) and financial support (31%).

Financial contributions

Social economy organizations also contribute to the economy. According to the NSNVO, nonprofit and voluntary organizations in BC and Alberta generated $20.6 billion in revenues in 2003 (Murray 2006; Roach 2006). Even though not representative for the sector, the information collected with the BALTA mapping survey gives a rough idea of the economic characteristics and significance of the sample. The total actual operating budget reported by 184 respondents accounts for $309 million and the total actual capital budget reported by 118 respondents equaled $952 million. Approximately a third of respondents who specified an operating budget reported an annual budget over $1

[4] Statistics Canada categorizes business enterprises with less than 100 paid employees as small, with 200-499 as medium-sized and those with 500 and more as large enterprises.

million. The total revenues earned account for $608 million. With respect to sources of revenues, a few points are worth noting. Two thirds of our sample engage in market-based activities and sales of goods and services ($271 million) as well as service contracts ($39 million) account for more than half of total revenues. High revenues are also derived from donations (20%) and government grants (12%).

With respect to the distribution of their financial surplus, the majority of organizations (73%) invest their profits back into the organization. Less common were donations to other community organizations and community trusts and reserves. Only in 4% of cases do members receive parts of the organization's profits.

Women and the social economy

The purpose of the social economy is to provide goods and services insufficiently provided by the state and private sector, often focusing on minorities and marginalized people. Using women as a group that is frequently underrepresented and disadvantaged when it comes to, for example, employment and income, we find that social economy organizations in BC and Alberta not only provide goods, services and employment to women but also are characterized by a stronger representation of women in their organizations (measured by the percentage of women on boards of directors).

Organizations reported between one and 87 board members (209 counts). The average board size of 9.7 indicates that the high value of 87 should be seen as exception (median of nine). Only five respondents stated that their board of directors has more than 25 members. In respect to the gender composition of board members, almost half of all board directors in our sample are women (46.6%) and 93.8% of all organizations have at least one female board director. More than half of the organizations stated that their board of directors consisted of at least as many women as men. Five percent of organizations have boards that consist solely of women. According to a 2007 census of women board directors of Canada's 500 largest companies, only 13% of board seats were held by women (constituting a one percent increase from 2005, Catalyst 2006) and 56.8 percent of companies had at least one woman board director (Jenner et al. 2008). While 2007 figures are not available for the provincial level, the 2005 report shows that Alberta and BC lay below the national average of 12% of board seats held by women with 11.7 and 11.5% respectively (Catalyst 2006). Even compared to the three sectors with highest percentages of women directors in the census, insurance services (30.8%), real estate and credit unions (both 25%), the survey sample shows considerably higher representation of women board directors.

Women are also a common target group or beneficiaries of the social economy as already described above. Fifty survey respondents (23%) reported to employ a total of 829 target employees of which 70% are women. The relatively high numbers of women board directors and target employees could be explained by organizations that specifically focus on women or are restricted to women. Asked about the social purpose or perspective of their organization, 39 respondents (17.5%) mentioned women as beneficiaries but only three identified women as the primary focus of their organization. In comparison, organizations named other disadvantaged groups more frequently as their main focus including persons with disabilities (12 counts), unemployed persons and persons with mental illness (6 counts each), and lower income individuals (4 counts) while indigenous people (2 counts), ethnic communities and homeless persons (1 count each) were rarely represented by our sample. This suggests that women in general may play a stronger role in the social economy than they do in the public and private sectors, and are essential to the functioning of the sector.

Environment and the social economy

The majority of social economy research emphasizes the social purpose and mission of organizations and frequently neglects environmental objectives, despite growing recognition that environmental and social issues are often interrelated. Smith and Young (2007:8), for example, point out that "the mutual, common or general interest that is fundamental to [the social economy] ethos is arguably fertile ground for the recognition of environmental considerations." In their comparison of the historical and ideological foundations of the social economy and sustainability movement literature Soots and Gismondi (2008) identify a number of significant overlaps between the two such as democracy, cooperation, mutualism, decentralization and a progressive sense of place. The BALTA social economy survey targets both environmental and social purpose organizations in order to analyze overlaps, identify mutual benefits and help advance strategies on how to pursue social and environmental goals.

The majority of survey respondents (85.4%) stated that their organizations have a social mission. And just over a quarter indicated having an environmental mission (26.7%) (Table 5). Of the latter, all but four organizations stated that they have both an environmental and social mission suggesting that environmental missions are almost always combined with a social objective (93% of cases) while just over a quarter of organizations (29%) with stated social missions reported environmental objectives too. When organizations with a stated social and environmental mission are grouped according to their primary sector of activity, 11 organizations (20%) stand out as environmental organizations with primary environmental objectives mainly in the area of conservation and protection. The remaining organizations, that see their primary activity in social services (13%), teaching and education (11%) and a wide range of other areas (12 different sectors), have stated environmental missions focusing on alternative/sustainable business practices, agriculture and food, waste management and recycling, and health. Two thirds of environmental social economy organizations (66%) engage in market-based transaction while 28% said they did not sell any services and goods (6% did not answer the question).

Table 5: Organizations with social and/or environmental mission

	Social	Environmental	Social and Environmental
Yes	182 (85.4%)	57 (26.7%)	53 (24.9%)
No	25 (11.7%)	147 (69.0%)	152 (71.4%)
N/A	6 (2.8%)	9 (4.2%)	8 (3.7%)

Future Directions

With respect to empirical evidence, researchers often distinguish between reliability and validity. For the BALTA mapping survey, we developed social economy criteria and survey questions based on our reading of the literature in the discipline and drawing on social economy mapping research to date. The information collected with the BALTA survey is a selected sample, which makes it difficult to subject it to quantitative analysis and to make generalized statements. But we can investigate the data in a variety of ways not claiming statistical significance, rather using sorting procedures we can index how well organizations fit our selected social economy criteria. We are currently recoding a number of response variables (including our predefined social economy criteria). Our use of a social economy continuum idea should allow us to revisit the initial social economy criteria and selection process based on exclusion and inclusion. For example, a social economy continuum could be used to identify some new natural boundaries and sub-groups (clusters) of our sample.

We also hope to do some cross tabulations with certain kinds of organizations (sample sub-groups) such as environmental social economy organizations, some technical sorting and cross tabulations by key variables (e.g., primary sectors, legal form). We are particularly interested in the financial contributions of the sector, types of earned income and percentage or revenue by classification. This should, for example, allow the sector activists to argue that any organization with above a certain percentage of income generated in the market, would qualify as a social enterprise and hopefully be subject to a different set of enabling policy support.

Regional analysis will allow us to drill down and get a better understanding of the anatomy of social economy organizations in selected areas and potentially regional differences. Using the idea of embeddedness, inter-organizational networks and synergies can be used to measure and explain the effectiveness of the sector. Further, the data set derived from the survey will be used to identify case studies for future research, for example, in respect to intermediaries, gender issues and environmental issues and the social economy. Aboriginal, French and ethnic communities don’t seem to be sufficiently represented by the data collected and we are concerned to address these groups using gap analysis.

Ultimately, the goal of the mapping project is to provide information that can be used to scale up from smaller success models to larger ones, and to influence policy and strengthen the foundations of the social economy in the BC and Alberta.

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