

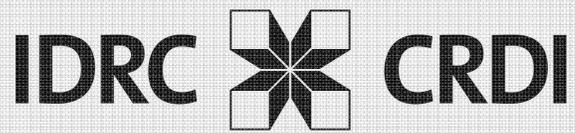


Working Paper
Territory and Local Development:
A Place-based Perspective

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A Word from Margie Mendell

President, Research Committee FIESS

A Research Committee of the FIESS, made of academics and representatives from Canadian and international organizations, was convened to prepare five working papers on the Forum's themes, one synthesis paper on the broad theme of FIESS and six case studies. These background documents are available thanks to the generous support of three major partners of FIESS: the International Development Research Center (IDRC), the International Labour Organisation (ILO), the Center for International Studies and Cooperation (CECI) and Human Resources and Skills Development Canada (HRSDC).

The objective of the working papers, written by experts on each of the five FIESS themes, is to provide an overview of the challenges and issues raised by each of the Forum's themes (territory and local development; innovation and collective entrepreneurship; solidarity finance; work and employment and food security and sovereignty) and the relations between government and civil society in several countries that are useful illustrations of collaborative approaches to policy formation. These papers document experiences in many parts of the world that have significant heuristic value; they are not presented as best practices or as models to replicate. They situate the discussions in different national contexts and introduce pertinent theoretical debates on the role of the social and solidarity economy today. As the social and solidarity economy continues to evolve, these papers are offered as a "work in progress". Their purpose is to stimulate debate and discussion among FIESS participants.

The case studies are not limited to a single experience within each country. They include a variety of initiatives (national, regional or municipal) and provide an overview of the current and potential partnerships between government and civil society. The case studies document a broad array of experiences in six countries on four continents where the social and solidarity economy has made significant progress (Canada, Brazil, Mali, Bolivia, Spain and South Africa). More specifically, they describe the processes underlying the co-construction of public policy that address one or more of the forum's themes. Each case study was co-authored by practitioners and local researchers and coordinated by the Research Committee, reflecting the commitment of the Forum to develop and nurture an ongoing dialogue between the different actors engaged in the social and solidarity economy and to create opportunities for collaboration.

As President of the Research Committee, I would like to thank all its members for their hard work and dedication. Finally, as you will notice, these papers have been written in several languages. They are available in their original language except for the Brazilian case study which was translated into Spanish. I hope these documents will inspire a rich and constructive dialogue among FIESS participants and contribute to the growth of social and solidarity initiatives throughout the world.

Présentation des activités de recherche

Margie Mendell

Présidente du comité scientifique du FIESS

Un comité scientifique du FIESS, incluant des chercheurs du milieu universitaire et des représentants d'organisations canadiennes et internationales, a été formé pour préparer des documents de travail portant sur les cinq thématiques du forum, une recherche transversale et six études de cas. Ce projet a pu voir le jour grâce à la volonté et au soutien de trois partenaires majeurs de l'événement, soit le Centre de recherche pour le développement international (CRDI), l'Organisation internationale du travail (OIT), le Centre d'étude et de coopération internationale (CECI) et Ressources humaines et Développement des compétences Canada (RHDC).

L'objectif de ces documents de travail est de dresser un état des lieux synthétique des enjeux et des défis entourant chacun des cinq sous-thèmes du forum, (territoire et développement local, innovation sociale et entrepreneuriat collectif, finance et commerce solidaires, emploi et travail, sécurité et souveraineté alimentaires) et de faire le point sur l'état de la recherche sur ces questions tout en faisant ressortir les enjeux liés aux relations entre les pouvoirs publics et la société civile. Ces textes abordent les différentes problématiques de manière générale en incluant des exemples pertinents mettant en évidence les enjeux et les défis liés aux questions soulevées. Ces exemples sont davantage des illustrations que des modèles à reproduire. Pour réaliser ces travaux, le comité scientifique a invité plusieurs experts reconnus sur chacun de ces cinq thèmes à se pencher sur la pertinence des initiatives d'économie sociale et solidaire comme réponse aux grands défis rencontrés dans ces différents domaines.

Par ailleurs, ces documents n'ont pas la prétention d'imposer une vérité ou d'orienter les échanges qui auront lieu durant le forum, mais bien d'offrir une mise à jour aux participants et de nourrir les discussions et les débats. Ces recherches peuvent être considérées comme des travaux en cours (*work in progress*) qui devront être poursuivis par les participants. Enfin, ces documents permettent également de situer dans un contexte plus large les études de cas nationales.

Les études de cas ne se limitent pas à une expérience par pays mais couvrent un ensemble d'initiatives (nationales, régionales ou municipales) et donne un aperçu des relations et des éventuels partenariats entre les pouvoirs publics et la société civile dans un pays donné. Plus précisément, les chercheurs ont étudié, en partenariat avec des praticiens, les dynamiques de co-construction de politiques publiques en faveur de l'économie sociale et solidaire et en lien avec un ou plusieurs des cinq thèmes du forum. Les études de cas offrent un large éventail d'expériences à travers l'étude de 6 pays sur quatre continents où l'économie sociale et solidaire a connu des avancées significatives (Canada, Brésil, Mali, Bolivie, Espagne et Afrique du Sud).

Chaque étude est le fruit d'une collaboration entre praticiens et chercheurs locaux coordonnée par le comité scientifique. En ce sens, ces travaux s'inscrivent naturellement

dans ce forum voué à la construction d'un dialogue pérenne entre les différents acteurs de l'économie sociale et solidaire.

En tant que présidente du comité scientifique, j'aimerais remercier tous ses membres pour leur travail assidu et leur dévouement. Enfin, comme vous pourrez le constater, ces travaux ont été réalisés en plusieurs langues. Ils sont disponibles dans leurs langues originales, sauf l'étude de cas sur le Brésil qui a été traduite en espagnol. J'espère que ces documents vont inspirer un dialogue riche et constructif entre les participants du FIESS et que, de ce dialogue, naîtront des initiatives concrètes en faveur de l'ESS.

Presentación de las actividades de investigación

Margie Mendell

Presidenta del comité científico del FIESS

Un comité científico del FIESS, compuesto por investigadores universitarios y representantes de organizaciones canadienses e internacionales, fue formado para preparar documentos de trabajo sobre los cinco temas del foro, un estudio transversal y seis estudios de caso. Este proyecto ha sido posible gracias a la voluntad y el apoyo de tres de los socios principales del evento, que son el Centro de Investigaciones para el Desarrollo Internacional (IDRC), la Organización Internacional del Trabajo (OIT), el Centro de Estudios y de Cooperación Internacional (CECI) y Recursos humanos y Desarrollo de capacidad Canadá (RHDC).

El objetivo de estos documentos es proporcionar un resumen general de las cuestiones y desafíos de cada uno de los cinco sub-temas del foro (Territorio y desarrollo local, Innovación y emprendimiento colectivo, Finanzas y comercio solidarios, Empleo y trabajo, Seguridad y soberanía alimentarias) y ofrecer un estado de la situación de la investigación sobre estos temas, destacando además las cuestiones vinculadas con las relaciones entre los poderes públicos y la sociedad civil. Los textos tratan los temas de una manera general, mediante la inclusión de ejemplos relevantes que destaquen los asuntos y desafíos relacionados con las cuestiones planteadas. Estos ejemplos son ante todo planteados a modo ilustrativo, más que modelos a replicar. Para realizar estos trabajos, el comité científico ha invitado a varios expertos reconocidos en cada uno de estos cinco temas para examinar la pertinencia de las iniciativas de economía social como respuesta a los grandes desafíos en estas áreas.

Además, estos documentos no pretenden imponer una verdad o dirigir los intercambios que tendrán lugar durante el Foro, sino que representa un intento de proporcionar a los participantes una actualización sobre los temas y alimentar las discusiones y debates. Estas investigaciones pueden considerarse como un trabajo en progreso (*work in progress*) a perseguir por los participantes. Por último, estos documentos permiten también insertar los estudios de casos nacionales en un contexto más amplio.

Los estudios de casos no se limitan a una experiencia por país, sino que abarcan una serie de iniciativas (nacionales, regionales o municipales) y describen las relaciones y las

posibles colaboraciones entre los poderes públicos y la sociedad civil en un país dado. En concreto, los investigadores estudiaron, en colaboración con los profesionales, las dinámicas de co-construcción de políticas públicas para la economía social y en relación con uno o más de los cinco temas del foro. Los estudios de casos ofrecen una amplia gama de experiencias a través del estudio de seis países en cuatro continentes, donde la economía social ha experimentado avances significativos (Canadá, Brasil, Mali, Bolivia, España y Sudáfrica).

Cada estudio es el resultado de una colaboración entre profesionales e investigadores locales coordinados por el comité científico. En este sentido, estos trabajos encajan adecuadamente en un foro dedicado a la construcción de un diálogo permanente entre los diferentes actores de la economía social y solidaria.

Como Presidenta del Comité Científico, quisiera agradecer a todos los miembros por su duro trabajo y dedicación. Finalmente, como usted habrá podido notar, estos trabajos se han realizado en varios idiomas. Todos están disponibles en su idioma original, a excepción del estudio de Brasil, que ha sido traducido al español. Espero que estos trabajos inspiren un diálogo rico y constructivo entre los participantes del FIESS y que de este diálogo puedan surgir iniciativas concretas para la ESS.

Abstract

The social and solidarity economy is above all the outcome of collective action at the local level. The most successful initiatives are rooted locally. What is the appropriate role of public authorities and civil society actors? This Working Paper offers a *place-based development perspective* to conceptualize the social and solidarity economy as an innovative and inclusive response to contemporary globalization. Situating the movement in the context of three major research traditions in local and territorial development – economic geography, community development, and new public governance – the discussion paper explores links between models of participatory governance and a comprehensive policy agenda for advancing the social and solidarity economy. Key challenges are identified for both governments and local communities, and strategies for moving forward are proposed. In the past decade, important elements of this agenda have been taken up by governments around the world and the Working Paper highlights several promising innovations.

Résumé

L'économie sociale et solidaire est avant tout le résultat d'actions collectives au niveau local. Les initiatives les plus réussies sont ancrées localement. Quel rôle doit être joué par les pouvoirs publics et les acteurs de la société civile ? Ce document de travail présente l'économie sociale et solidaire avec une approche locale et comme une réponse à la mondialisation actuelle. En resituant le mouvement au sein des trois grands courants de recherche du développement local et territorial – la géographie économique, le développement communautaire et la nouvelle gouvernance publique – ce travail de recherche explore les liens entre les modèles de gouvernance participative et l'agenda global des politiques en faveur de l'économie sociale et solidaire. Les principaux défis rencontrés par les gouvernements et les communautés locales sont identifiés et des stratégies d'action sont proposées. Durant la dernière décennie, plusieurs éléments de cet agenda ont été mis en place par les gouvernements du monde entier. Ce document de travail souligne plusieurs de ces innovations prometteuses.

Resumen

La economía social y solidaria es, por encima de todo, resultado de una acción colectiva local. Las iniciativas que más éxito tienen se encuentran a escala local. ¿Cuál es el papel que deben desempeñar las autoridades públicas y los actores de la sociedad civil? Este documento de trabajo ofrece una perspectiva de desarrollo local para conceptualizar la economía social y solidaria como una respuesta innovadora e inclusiva a la globalización actual. Este artículo de debate sitúa este movimiento en el contexto de tres líneas de investigación fundamentales relacionadas con el desarrollo local y territorial (geografía económica, desarrollo de las comunidades y nueva gobernanza pública), y explora relaciones entre los modelos de gobernanza participativa y un programa de iniciativas integral para promover la economía social y solidaria. Se identifican los retos más importantes tanto para los gobiernos como para las comunidades locales y se proponen estrategias para avanzar. En la última década, gobiernos de todo el mundo han incluido elementos importantes de este programa y el documento de trabajo señala varias innovaciones prometedoras.

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INTRODUCTION

The last thirty years have been a period of great economic change. The globalization of production, the continuous flow of new technologies, and cycles of boom and bust, have combined to create complex challenges for citizens, communities, and governments alike. On the one hand, the premium placed on creativity and innovation in the knowledge-based economy offers tremendous rewards to those who develop and apply the best ideas. On the other hand, these same dynamics leave many more people and places struggling to find their way without resources or opportunity. In countries around the world globalization delivers a double-edged reality as innovation and exclusion both shape contemporary restructuring processes.

Early observers of economic globalization predicted the “death of distance” and the “end of geography”, announcing a new age of hyper mobility and cyberspace communities (Cairncross, 1997). It turns out that these expectations were off the mark. Researchers from a variety of social science fields report that today’s change drivers and adaptive strategies play out in territorially specific ways, shaped by unique local constellations of assets, knowledge, networks, and identities (Bradford, 2011; *Horizons*, 2010). Attention shifts from abstract accounts of globalization to the concrete ‘local places and territorial spaces’ where the flows and forces of socio-economic change intersect. Cities and communities are globalization’s front-lines. They are where the problems converge, and the opportunities for adapting in innovative and inclusive ways are greatest.

To explore these challenges and opportunities, this discussion paper offers a *place-based development perspective* to analyze the social and solidarity economy as an innovative and inclusive response to contemporary globalization. Situating the movement in the context of three major research traditions in local and territorial development – economic geography, community development, and new public governance – the discussion paper explores links between innovative models of empowered governance and a comprehensive policy agenda for advancing the social and solidarity economy. In the past decade or so, key elements of this agenda have been taken up by governments at different levels around the world and we close by highlighting several of these evolving frameworks in various places.

PART 1 - CONCEPTUAL FRAMEWORK: THE NEW LOCALISM AND PLACE-BASED DEVELOPMENT

The “New Localism” is a term that now resonates across a multi-disciplinary scholarly literature analyzing how globalization’s most important flows of people, investment, and ideas intersect in cities and communities around the world (Gertler, 2001; OECD, 2006). The research underpinning the new localism identifies five defining features of the contemporary political economy.

- *Wicked problems*: Many of today’s most urgent socio-economic problems such as poverty reduction, social inclusion, and ecological sustainability are complex and

interrelated. Identifying the primary triggers or determining cause and effect relations underlying the evident distress is difficult. Wicked problems are characterized by critical information gaps about what is required to help and pose significant coordination challenges in delivering the appropriate resources to the right target.

- *No one-size-fits-all solution:* Problems find specific expression in different territorial spaces related to local and regional histories, cultures, and institutions. In each case the challenge is to find the appropriate levers or points of intervention to tackle the particular circumstances ‘on the ground’. Communities will identify pathways forward based on their own contextual knowledge of problems and collective aspirations for the future.
- *Context Matters:* Features of the “local milieu” shape problems and condition reform strategies. For example, in social inclusion, studies of “neighbourhood effects” demonstrate the impact of local communities – their social services, employment networks, and physical design – in determining individual life chances. Similarly, studies of economic development now emphasize that innovation depends on local infrastructures and knowledge networks.
- *Blended Knowledge:* Solving wicked problems requires a range of inputs from different actors and institutions. Diverse forms of knowledge can be combined for comprehensive development strategies. These include codified or technical ‘know what’ that describes the dimensions of the problem, often through statistical analysis *and* more tacit or experiential ‘know how’ that maps pathways to change, identifying the key players and policy tools to reach the goal.
- *Collaborative Engagement:* Given the complexity of issues, collaboration is imperative. No single actor has the knowledge, authority, or resources to solve problems on its own. Frameworks for joint action and shared responsibility must be developed. Further, local citizens and civil society organizations, with a direct interest in -- and deep knowledge of -- the places where they live and work, must be included in decision-making.

These five features – all emphasizing complexity and interdependence -- expose the gaps and limitations in traditional government structures and policy processes. They are typically organized to deal with problems of people and places as if they can be divided into discrete social, economic, or environmental needs. Public resources are then directed toward one component of interwoven issues, and too often in a top down, remedial fashion after a crisis or breakdown has occurred. Moving beyond such categorical attitudes and reactionary practices requires understanding that government cannot act alone through closed, bureaucratic hierarchies. Instead, networked relations are necessary among public, private, and civil society actors at local and regional scales where issues find concrete and particular expression. Such networks constitute an adaptive and localized socio-economic infrastructure for *place-based development strategies* that envision local actors not as ‘passive policy takers’ but as strategic agents capable of

working collectively to mediate and transform global flows for collective purposes. The core components are succinctly captured in the recent report *The Future of Cohesion Policy in the European Union* (Barca, 2009):

Place-based Development

- a long-term development strategy whose objective is to reduce persistent *inefficiency* (underutilization of the full potential) and *inequality* (share of people below a given standard of well-being and/or extent of interpersonal disparities) in specific *places*,
- through the production of bundles of *integrated*, place-tailored *public goods and services*, designed and implemented by eliciting and aggregating local preferences and knowledge through *participatory political institutions*, and by establishing linkages with other places; and
- promoted from outside the place by a system of *multilevel governance* where universally available grants, designed to promote stable and equitable outcomes between localities, are transferred from higher to lower levels of government.

As Barca's third point makes clear, place-based development interprets the local level "in an institutionally and spatially embedded way" (Moulaert, et al., 2005: 1978). That is, the local place is not viewed as a bounded territory within which both the causes of, and solutions to, exclusion or depletion solely reside. In fact, many local challenges stem from the dynamics of the global economy and the decisions made by upper level governments. Such external factors always structure local trajectories. In place-based development, the 'local' is neither a self-contained area nor a homogenous community. Rather it is a distinctive and differentiated place embedded in wider institutional relations, shaped by community interactions with extra-local flows and forces.

As such, the place-based perspective offers a dynamic "inter-scalar" analysis of local and territorial change (OECD, 2006; Brenner, 2004). It explores relations among actors from civil society, the state, and the market in constructing new governance systems and development strategies. The focus shifts from dichotomies of centralization and decentralization of power to negotiated compromises between the principles of conditionality and subsidiarity. Place-based development relies on smart and well-resourced intermediary institutions (Mendell and Neamtan, 2010) to bridge long-standing divides between government and civil society including local pressures for experimentation *and* national policies for cohesion; the state's technical/codified knowledge *and* the community's experiential/tacit knowledge; and the state's emphasis on representative democracy *and* the community's desire for participatory democracy.

In practice, place-based development involves three central processes: first, *embedding wealth creation* locally in social relations and institutional networks; second, *mobilizing community assets* to challenge externally imposed narratives of dislocation and decline; third, *restructuring the state* to recognize and empower local civil societies and scale-up

community-driven social innovations. Each of these dimensions of the place-based approach to local and territorial development has been the subject of sustained research in major social science traditions.

The next section reviews three strategic bodies of knowledge, identifying important links to the social and solidarity economy.

PART 2 - KNOWLEDGE INVENTORY: THREE RESEARCH TRADITIONS IN TERRITORY AND LOCAL DEVELOPMENT

1. Economic Geography: Embedded Economy and Learning Networks

Economic geographers study local and territorial development in the context of today's knowledge-driven global economy (Gertler, 2001; Amin, 1999). Their research describes fundamental economic changes that make local places more important as sites of production even as globalization accelerates. Most importantly, economic geographers emphasize the role of ideas in generating economic value. From this insight, they explore how the social cohesion and resilience of territorial economies depend on their collective capacity for innovation – the generation and application of knowledge for wealth creation that builds and renews local niches in the wider national and global contexts. It follows that economic development is not the byproduct of a 'free floating market' but rather the result of organized social learning among producers and users of knowledge who cluster geographically to build distinctive territorial assets (Gertler and Wolfe, 2004).

Such localized innovation drives "endogenous economic development" (Pike, et al. 2006). The emphasis shifts from short term cost considerations to the longer term, collective investments in the *relational assets of development* such as social capital, knowledge networks, and face-to-face dialogue about shared needs. Local economic actors – firms, enterprises, workers, governments, researchers, unions – all become embedded in systems of social interaction and institutional learning. Economic geographers show how production can be anchored 'in place' through research consortia, supply chain nodes, local talent pools, and supportive intermediary institutions. Such networked relations circulate knowledge and pool the resources to adapt through strategies that balance economic, social, and ecological priorities.

Each of these characteristics of the knowledge-based economy emphasizes the territorial dimension of innovation, and the importance of localized learning. It follows that economic geographers now identify *resilient communities* as the economic engines of nations and foundations for social cohesion. City-regions with their density and diversity represent the ideal space for learning and innovation. As David A. Wolfe writes, the scope, scale, and velocity of interaction among people and organizations in large urban centers creates unparalleled "opportunity for knowledge spillovers across economic sectors [that] enhances the potential for innovation and the generation of new economic ideas among local firms" (Wolfe, 2009:17). At the same time, the "place-based approach facilitates the identification and re-conceptualization of rural assets in new and innovative

ways” (Reimer and Markey, 2008: 8). Recent research mapping the “creative rural economy” demonstrates the potential for revitalization through leveraging the unique quality of place and lifestyle amenities in non-metropolitan areas (Queen’s University Department of Geography, 2008). In sum, economic geographers show that resilient communities, whether urban or rural, are distinguished by their “innovative local milieu” forged through the combined efforts of community, economic, and state actors. Local and regional *innovation systems* identify local assets (human, social, financial, natural, and cultural capitals) and leverage them through external resources (policies, services, investments) for comprehensive territorial development strategies (Bradford, 2011).

Importantly, economic geography research now calls for *socially sustainable development*, challenging traditional forms of local and regional development as narrowly preoccupied with economic growth ‘at all costs’ (Morgan, 2004; Healey, 2007). Especially in the wake of the 2009 Great Recession, more holistic visions emphasize quality of life metrics such as decent jobs for all and ecologically sustainable production. It is time “to unpack dominant ideas of local and regional development and reveal the relations between broader notions of economic, social, political, ecological and cultural development [otherwise] more balanced, cohesive and sustainable development of localities may remain out of our reach” (Pike et al. 2006: 256).

The second major research tradition in local and territorial development takes up this challenge, focusing on ideas about community and social sustainability.

2. Community Development: Asset Building and Civic Engagement

Research in the community development tradition views community as a specific geographic place – the physical and social space that shapes how people live and work (Torjman, 2007). The relevant scale of action varies depending on the particular issue in focus, ranging from the neighbourhood, to the city, or rural region. Regardless of the scale, the concern in community development action-research is to expand access to quality services and decent jobs for population groups excluded or marginalized from opportunity, whether by income, race, disability, age, or gender.

The interest in community derives from the recognition that the “quality of place” directly affects the well-being and success of disadvantaged population groups (Smith et al., 2007). Much of the analysis of new forms of spatially concentrated poverty adopts the same territorial lens that highlights the localizing dynamics of economic innovation. However, the social context for those left behind is not empowering. Researchers document negative “neighbourhood effects” – poor services, few contacts, exposure to crime and so forth – that compound the constraints on people already in difficulty as barriers in one aspect of life become entangled with others (Dunn et al., 2010). For example, a training program to help social assistance recipients move into employment won’t succeed if prospective workers can’t access affordable child care or transit. By contrast, local places rich in social networks and community infrastructure have a positive impact on individual and family health and well-being. Such communities

recognize that human needs are not compartmentalized and pursue coordination and collaboration.

Research from both front-line practitioners and scholars has identified key components of robust community development strategies (Born, 2008; Taylor, 2003). The departure point is to reframe the issues by envisioning social inclusion as both ‘an end and a means’ to development. Social inclusion as an end state seeks opportunity for all citizens to participate to their full potential in the economy and community. Rather than assessing people and places in terms of their problems or needs, emerging approaches start with their assets, harnessing local capacities and strengths (Williams, 2006). A new role in the knowledge economy, for example, might arise through a mix of community-driven strategies for social enterprise, environmental stewardship, and business mentorship. As a means, then, the inclusive approach to community development values a process of engagement and empowerment through grass-roots participation in political and economic decision-making.

Crucial to this vision are “comprehensive community initiatives” that work across the economic, social, cultural, and political dimensions of exclusion and tap the lived experience of the marginalized to guide policies and services. Investments are required in the local infrastructure of civil society organizations and non-profit intermediaries which provide collective direction, and also in the civic literacy of residents empowered to participate in decision-making. Community development research puts local actors and vulnerable citizens at the center of change processes, mobilizing their skills and knowledge. Local governance bodies align the different resources, making “a deliberate and conscious effort to capture the diversity of the community in both demographic profile and composition by sector.” (Torjman, 2007 :41).

Community development action-research maps a compelling local pathway beyond social exclusion. However, there are challenges, notably in the movement’s relationship to the state (Guy and Henenberry, 2010). On the one hand, public funding to community organizations is increasingly project based, with onerous reporting requirements. Little time or resources are available for building a movement with the capacity to innovate. On the other hand, government policies often work at cross-purposes and rarely demonstrate the longer term orientation required for inclusive territorial development. These challenges are significant because community development in no way minimizes the need for a solid core of public goods and services. Community-based actions can supplement and complement - but never replace - such foundational policies. Most important is that community action and public policy are mutually reinforcing (Bradford, 2009).

The third research tradition in local and territorial development explores these state and public policy challenges.

3. New Public Governance: State Restructuring and Policy Innovation

The New Public Governance is an emerging policy research perspective that acknowledges wicked problems and recognizes the need for local and territorial strategies (Osborne, 2009). Unlike the New Public Management, researchers advancing the New Public Governance stress the importance of collaborative relations and the government's pivotal role in supporting social innovation. The New Public Governance seeks both new public policy ideas and reformed relations between state and civil society (Vaillancourt, 2008). Three themes are central:

Coordinated Government: Horizontal integration of government Departments and Ministries enable focused and holistic problem-solving. Policy leadership is housed through a central agency or secretariat with a cross-cutting mandate to coordinate 'whole of government' approaches.

Civil Society Empowerment: Government policy relationships with civil society actors are based on principles of co-construction. Co-construction involves setting the general directions for public policy and key design features in terms of instruments and tools, and then jointly implementing programs and services. The result is a substantive democratization of state decision making and public policy. The relationship is not the usual one-off consultation or testing of public opinion but an institutionalized dialogue between representative and participatory forms of democracy.

Multi-level Collaborative Governance: Institutionalized collaboration works both vertically across levels of government, and horizontally among public, private, and community sectors at the local and territorial scale. Collaboration is structured through framework agreements that specify roles and responsibilities in problem-solving networks or strategic partnerships.

With these three themes, the New Public Governance explores how coordination, empowerment, and collaboration can work. Here the ideas and strategies proposed by Archon Fung and Erik Olin Wright are path breaking (Fung and Wright, 2003; Mendell, 2005). Committed to democratic governance and social justice, they detail the operative principles and institutional design for "empowered participatory governance". This model leverages the joint capacity of civil society representatives and government organizations to co-construct policy solutions and alternative development strategies. Based on research from around the world in matters ranging from municipal budgeting to ecological preservation, Fung and Wright describe the growing number of intermediary governance spaces generating innovative local and territorial development. They identify a series of interrelated action principles and design features:

Empowered Participatory Governance: Action Principles

Practical Orientation: Focus on specific concrete problems that lend themselves to immediate practical action rather than broad ideological debate. The benefits are two-fold: building trust across sectors and gathering momentum through a results-orientation.

Bottom-up Participation: Involving local residents ‘living with’ complex, evolving problems is critical. Their experiential knowledge, combined with the practical insights of front-line government officials, is required for comprehensive territorial strategies.

Deliberative Solution Generation: Given the range of actors and perspectives engaged, deliberative approaches enable participants to develop a shared agenda. Through face to face dialogue, different actors can acknowledge conflict but find reasonable compromises for joint action. Learning from one another and foregrounding the community interest, groups can move beyond narrow positions.

Countervailing Power: Power relations cannot be overlooked and steps must be taken to ensure that inequalities do not subvert the democracy-enhancing potential of institutionalized collaboration. In addressing the wider social and political conditions, the state and governing political parties play key roles in leveling the deliberative field. Government’s regulations can prevent more powerful groups from exiting the dialogue; and government can invest in the capacity of civil society organizations.

While the merits of these principles for democracy and justice are self-evident, Fung and Wright go further. They ground the discussion in the real world of government-civil society interactions. As they observe, realizing the benefits requires conscious institutional design “to stabilize and deepen the practice of these basic principles” (Fung and Wright, 2003:15). They propose three design features.

Empowered Participatory Governance: Design Features

Devolution: Decision-making authority flows downward and outward to local and regional bodies joining state and civil society actors. Such bodies are not simply advisory but empowered by the state to help devise, implement, and monitor plans. Along with authority, appropriate resources are also transferred, guarding against government off-loading or downloading of responsibilities without local voice or community capacity.

Centralized Coordination: To avoid the dangers of excessive decentralization (for example, a race to the bottom investment competition between localities), Fung and Wright propose two specific forms of inter-scalar coordination. First, consistent with the emphasis on local accountability, upper level governments ensure equitable policy resources across territorial sites and address problems beyond the reach of local actors on their own to solve. Second, the extra-local officials create linkages that connect the decentralized units to each other, enabling exchange of knowledge and experiences.

State Orchestrated: Empowered participatory governance retains a substantive role for government in public policy making. The model clearly rejects the privatization and deregulation of the New Public Management. Government must accept its responsibilities for investments and regulation in the public or community interest. However, Fung and Wright emphasize the importance of a restructured state with new principles, practices, and spaces that empower citizens and movements for policy co-construction. By participating, civil society transforms state structures and processes rather than simply lobbying or applying pressure from the outside.

In sum, Fung and Wright's framework is compelling because they translate the vision and ideals of the New Public Governance into concrete institutional reforms, using a range of case examples to illustrate the operational principles and practices. In linking theory and action, their concept of empowered participatory governance represents a valuable *social innovation* in revitalizing the fundamental values of participatory democracy, social justice, and the inclusive economy. Further, in reporting better community and policy outcomes, they demonstrate how empowered participatory governance advances the state's own strategic interests – enabling knowledge flows, reducing transaction costs, securing public buy-in, and assisting with performance monitoring and course correction.

Research Links to the Social and Solidarity Economy

Each of the three major place-based development research traditions speaks directly to the dynamics of the social and solidarity economy. The common emphasis is on local and regional spaces as sites of social learning, trust building, and institutional innovation. Within these geographic spaces, community assets are leveraged through intermediaries in the form of new partnerships and governance networks that engage citizens, connect enterprises, and supply a social infrastructure for provision of goods, services, and opportunities in the public interest (McMurtry, 2010). The overarching goal is to embed the economy in local places such that it responds to community needs and collective aspirations. The central message of these research traditions is straightforward: in the contemporary global age, both economic and social innovations remain territorially rooted, driven by the multiple assets of local communities. A key challenge is to ensure that upper level governments do their part to enable and consolidate the local innovations.

The next section of the Discussion Paper explores such place-based development in the specific context of the social and solidarity economy.

PART 3 - PLACE-BASED DEVELOPMENT FOR THE SOCIAL AND SOLIDARITY ECONOMY: CREATIVE TENSIONS AND MOVING FORWARD

As described above, the last several decades have seen national, regional and local economies buffeted by a series of global shocks, culminating in the Great Recession of 2009. Over time, these shocks and subsequent restructurings have exposed the limits of traditional state and market strategies. Against this backdrop, the social and solidarity economy movement has gathered momentum around the world to meet societal needs for

decent work, sustainable production, and better social services (Tremblay, 2009; Noya and Clarence, 2007). In many countries it is becoming an integral part of local and regional development strategies (Tremblay, 2009).

The social and solidarity economy's non-profit and cooperative enterprises are rooted in community, independent from the state and democratically organized to produce goods and services that address social well-being, environmental sustainability, and cultural inclusion (Neamtan, 2005). Capital and finance are instruments of human and community development not private profit. Much more than a series of individual enterprises or investment vehicles, the social and solidarity economy is a grass-roots movement with a vision of a pluralist economy that encompasses complementary roles for public, private, and collective enterprise. Many governments today at all levels from the local to the supranational are recognizing the social and solidarity economy as integral to the achievement of quality public policy and resilient communities.

As the social and solidarity economy grows it is crucial to heed warnings that it represents a "subtle abandonment of the universal welfare state under the guise of partnership, efficiency of service delivery, and local targeting" offering a "poor form of welfare for the poor" (Amin et al., 2002: 123). This view positions the social and solidarity economy instrumentally, struggling to fill gaps left by neo-liberalism's structural unemployment in the market and the post-Keynesian state's withdrawal from its social responsibilities. Progressive ideas about devolution and empowerment are co-opted to serve the purposes of the conservative management doctrines that diminish government through contracting- out, privatization, and downloading.

This critique is important. It stands as a reminder of the need to set out clear principles for the social and solidarity economy, and to mobilize locally, nationally, and globally for progressive governance. Fung and Wright's empowered participatory governance offers such a framework. It envisions a robust architecture for deliberative and developmental dynamics, creating the hybrid policy spaces required for learning about how best to tackle wicked problems, to forge cross-sectoral agreement, and to deliver long term solutions that revitalize communities. Applied to the social and solidarity economy, five specific, mutually reinforcing policy pathways can be identified (Amyot, Downing, and Tremblay, 2010; Tremblay 2009).

First, *formal recognition* by government of the social and solidarity economy helps ensure that public policy will mobilize and align resources for a comprehensive strategy for local territorial development. The social and solidarity economy is treated as a viable sector and autonomous movement, neither a by-product of the private sector or an extension of the public sector. Such recognition is crucial for policy co-construction and can take the form of constitutional rights or policy and legislative frameworks that provide explicit ongoing support.

Second, *sectoral interventions* give preference to the social and solidarity economy in implementation of certain areas of public policy, and also build the capacity of social enterprises providing goods and services. Leading sectors where non-profit providers can

be favoured include family policy for childcare or home care and social housing with co-operatives. Sector-based capacity building takes various forms: financial instruments such as patient capital funds or fiscal incentives for investors; adapting traditional supports for small and medium sized businesses to take into account the specificities of the mission, management, and legal structures of social economy enterprises; and facilitating human resources and skills development both within social enterprises and across intermediary organizations that bridge civil society and government.

Third, *targeted interventions* provide marginalized groups access to jobs and services. Certain population groups, such as the disabled, recent immigrants, indigenous peoples, and at risk youth, remain most at risk to unemployment and social exclusion. In partnership with social and solidarity economy actors, governments can increase the economic participation and social well-being of these citizens with targeted assistance using a variety of tools: procurement through social purchasing principles; wage subsidies; regulating equitable representation in occupational categories; investment in enterprises that are owned or managed by disadvantaged population groups; and investment in frontline services to ensure that vulnerable groups have full awareness of, and access to, health, education, housing, and income support.

Fourth, *appropriate evaluation* captures the unique character and value of the social and solidarity economy. The complexity of today's policy challenges require not only new governance mechanisms but also new performance measures attuned to processes of co-construction and co-production. Social and solidarity economy actors are working creatively to produce goods and services that meet community needs in socially sustainable ways. This mission challenges existing public value criteria. It demands new indicators to track contributions from social enterprises such as democratization, empowerment, and the development of inclusive economies and resilient communities (Bouchard et al., 2005). *Social accounting* integrates triple bottom line criteria, paying attention to the relationships that join economic, social, and environmental priorities. *Developmental evaluation* emphasizes qualitative evidence of change, capturing "resident wisdom behind the numbers" through personal reflection and narrative accounts of social learning (Torjman, 2007). *Learning-oriented evaluation* shifts the focus from external after-the-fact judgments of success or failure toward ongoing practitioner insights and adaptation in complex problem-solving environments. Taken together, these new evaluation frameworks constitute important parts of a robust public policy infrastructure. They value organizational innovations such as multi-sectoral collaboration and institutional intermediaries. They recognize the time required for durable change.

Fifth, a *place-based development strategy* supplies the overarching framework, using local geographical spaces to integrate the horizontal, sectoral, targeted, and evaluative components. The place-based framework ensures that the various tools and interventions do not remain 'one offs', filling certain gaps but not leveraging assets and capacities for comprehensive and sustainable development. It connects the different actors and their particular contributions: community-based networks with local knowledge and state officials with authority and resources; suppliers of social and solidarity economy supports with the evolving needs of social enterprises and service providers; and local and

territorial experiments to learning processes and sources of expertise at broader geographic scales.

Overall, this set of governance reforms and policy practices puts the social and solidarity economy at the leading edge of *transformative change* for a more just society and sustainable, inclusive economy. The vision of community is compelling but also challenging. Further progress depends on attitudinal and organizational change from the key actors in government and civil society.

Government Challenges

Place-based development strategies along the lines envisioned by Wright and Fung for co-construction and co-production of public policy can improve government policy performance (Osborne, 2009). Gaps between policy design and implementation can be closed, and working with and through community-based intermediaries can enhance government legitimacy and strengthen social cohesion. As governments seek to demonstrate public value in the global age these benefits are significant. However, substantive challenges remain:

- *Silo Mentality: ‘turf protection’ between bureaucratic departments and across political jurisdictions*
- *Command and Control: decision-making styles that are hierarchical, centralized, and risk adverse; confining interactions with civil society organizations to ritualistic consultations on set directions rather than co-construction*
- *Short-Term Perspectives: insufficient investment of time and resources for durable change through networked relations and institutional capacity-building*
- *Managerial Evaluation: preoccupation with departmental inputs and outputs rather than community outcomes; preference for project-based funding through highly prescriptive service delivery contracts; evaluation ill-suited to complex innovations with triple bottom line criteria*

These features of government thinking and practice are barriers to effective devolution, partnership, and facilitation for the social and solidarity economy (Guy and Heneberry, 2010). And they are not easily reformed (Phillips, 2006). They are rooted in prevailing systems of ministerial responsibility and public management that have long limited innovation and flexibility. Moreover, experience shows that in countries where innovation has flourished, shifting electoral winds can suddenly end the experimentation and learning when unsympathetic or uncomprehending political parties arrive in power (Bradford, 2007).

Simply put, government actors at all levels need to learn more about local and territorial development, and build their collective capacity for devolving, partnering, and facilitating. Policy designers need to practice co-construction and front line providers

need to pursue implementation partnerships. In both organizational contexts, public servants must value the assets and knowledge of local networks and residents. Governments must engage with civil society organizations in joint policy learning through community action-research; support education and training for civil servants in new skill sets and policy tools; and test innovative evaluation frameworks that capture the value over the longer term of investments in organizational infrastructure, policy collaboration, and citizen empowerment.

Civil Society Challenges

Just as governments must adjust and adapt, civil society organizations face certain organizational and strategic challenges. These include:

- From Opposition to Proposition: *shifting from adversarial relations with government and relying on ideological critique to collaborative policy development and joint problem solving*
- Capacity-building: *different mobilization strategies, knowledge sets, and organizational competencies are required for effective participation in shared governance; building organizational capacity that balances representation and advocacy with policy responsibilities is needed*
- Policy Intermediary: *working the space between the state, community, and economy, negotiating with governments on appropriate policy frameworks and tools, and building a strategic relationship with governments that advances a longer term, broadly based social and solidarity economy movement*
- Broad Representation: *the social and solidarity economy constituency is diverse and representative organizations need inclusion of both geographically-based community networks and sector-specific organizations; an umbrella association or stakeholder consortium must combine broad coverage of movement priorities with effective policy communication with government actors*

Civil society actors in the social and solidarity economy face ongoing challenges in building their governance and policy capacity. Indeed, these challenges are made more difficult in the current environment when governments are often reluctant to recognize the social and solidarity economy, invest in the infrastructure for collaborative relationships, and deploy the tools required to build capacity. Where governments rely on project-based support to civil society organizations and focus on short term input and output measures, the structural barriers to empowered participatory governance remain daunting. Under such bureaucratic constraints, civil society representatives can lose their connection to local communities and struggle to maintain the advocacy work at the heart of social movements.

Yet around the world there are now many numerous examples of “good practice” in governance and policy approaches to local and territorial development. The final section

of the discussion paper offers illustrative examples of such progress, drawn from different regions of the world and diverse governance settings including the supranational, national, provincial/state, and municipal/community.

PART 4 - MAKING CHANGE: ILLUSTRATIVE EXAMPLES

This discussion paper has offered a place-based development perspective to situate the social and solidarity economy as an innovative and inclusive response to the challenges and opportunities posed by globalization. Links between the model of empowered participatory governance and a comprehensive policy agenda for advancing the social and solidarity economy were highlighted. In the past decade or so, this agenda has been taken up by various governments and we close by highlighting aspects of several of these evolving governance and policy frameworks in Canada and elsewhere.

Supranational Scale: European Union (EU)

(At the supranational scale, governing bodies and policy organizations have introduced *cross-national frameworks for multi-level collaborative governance* that support and advocate local and territorial development of the social and solidarity economy).

The social economy has an extensive presence in Europe, with over 240,000 cooperatives, comprising 10% of all European businesses and 6% of EU employment, with 3.7 million people supplying services to 143 million people. The EU is the leading example of a supranational governing body advancing the social economy.

The EU Social Economy Policy Framework includes several key institutions, strategies, and funding programs enabling national governments to work with local and regional units. Social Economy Europe is a representative institution to promote recognition and capacity of social economy enterprises and organizations. Three related institutions – the Social Economy Unit in European Commission Directorate-General XXIII, the Social Economy Category within the European Economic and Social Committee, and the Social Economy Intergroup within European Parliament – provide substantive direction to the EU's support for the social economy. This support is expressed in a variety of funding initiatives, pilot projects, procurement guidelines and innovation programs.

At a strategic policy level, the Lisbon Strategy between 2000 and 2010 recognized the social economy's significance to employment and territorial development. The European Agenda for Entrepreneurship promoted social enterprises in labour markets, personal services, and disadvantaged areas, while using the EU's open method of coordination to address barriers. The EU's Strategic Guidelines for Cohesion Policy emphasizes community ownership of programs to integrate economic and social priorities.

Finally, the EU has supported the social economy through regular research and learning conferences and meetings. These gatherings generate data, exchange knowledge, and identify emerging priorities.

National Scale: France

(At the national scale, governments can create *comprehensive policy frameworks* for the social and solidarity economy and establish *governance institutions* for coordination and integration of devolved authority).

France has been recognized as one of the European countries with the greatest acceptance of the social economy. At the national level, commitment to social cohesion supports an inter-ministerial policy infrastructure for the social economy and social enterprise. A variety of supports for cooperatives and social enterprises have been legislated. Coordinated multi-level governance also occurs through Regional Chambers of the Social Economy that includes a National Committee to develop agreements for social economy initiatives. The benefits of a territorially integrated approach to the social economy are demonstrated in the French region of Provence-Alpes-Côte d'Azur (PACA). The regional government has created institutional spaces for policy co-construction and co-production of a social economy observatory, a development plan, and assessment tools. Intermediaries play important roles in convening all levels of government, community stakeholders, and commercial lenders for financial and technical assistance on local projects. These networks also promote and advocate for the social economy and propose policies and regulations for partnership-based and participatory strategic initiatives. The 2010 Vercamer Report on the social economy in France made the case for more place-based national policies using multi-level governance mechanisms for growing the social economy in different regions and localities.

Provincial/Regional Scale: Quebec

(Provincial/Regional governments can be leaders in developing *frameworks for co-construction and co-production* and *institutional intermediaries* aligning national policies with community-based priorities).

Quebec features more than a century of innovations rooted in the social economy tradition. The present day movement took shape in the mid 1990s when the provincial government organized an economic summit with business and civil society partners. Following the summit, in 1996, a Conference on the Economic and Social Future of Quebec, bringing together social movements including labour federations and non-profit enterprises, established an organizational and financial intermediary for the social economy, the Chantier de l' économie sociale. Over the past 15 years, successive provincial governments have worked with the Chantier for investments in the social economy in key policy contexts – territorial supports through local development centers and regional co-operatives and networks; sectoral interventions in childcare, housing, environmental recycling and other shared priorities including investment funds; and targeted measures for at risk youth or persons with disabilities. In providing this support, the government has utilized a 'whole of government' approach through an Office of the Social Economy and an Action Plan on Collective Entrepreneurship. Finally, the Quebec government has worked with the Canadian government and the Chantier to secure

resources (financial capital and capacity building support) through the federal Social Economy Pilot Initiative.

Municipal Scale: Rosario Argentina, and Edmonton/Winnipeg Canada

(Local governments typically lack the revenues and tools to build the social and solidarity economy, but as frontline organizations with planning and convening powers they can be *enabling partners* to community networks).

Rosario Argentina is Argentina's third largest city, and the municipal government has established offices for the Solidarity Economy and Cooperatives and Mutual Action to promote development of the urban economy based on solidarity and equity. Supports range from financial and technical assistance for social economy enterprises to training the unemployed in cooperative and democratic management, and innovative programs in local food production. Procurement policy for public works also favours solidarity economy enterprises. The city's commitments extend to public education about solidarity economy values and developing indicators to measure and communicate progress. Citizens in Rosario have also joined innovative civic engagement processes through a national research project exploring women's leadership roles at the local level and the links to the solidarity economy, and through participatory budgeting involving annual neighbourhood assemblies where 4,000 residents convene to decide funding allocations.

Edmonton and Winnipeg are two western Canadian cities that demonstrate the creative potential of municipalities in forging partnerships to advance the social economy. In Edmonton the municipal Community Services Department worked with two community organizations on social economy and social inclusion goals. With the Edmonton Community Foundation, it established the Social Enterprise Fund to provide patient capital loans, interim financing, and technical assistance grants to social enterprises and affordable housing cooperatives. The Department also partnered with Vibrant Communities Edmonton (see below) on workforce development, family economic support, and community investment

Winnipeg is a good example of a municipality partnering with other levels of government for community strengthening and neighbourhood revitalization. A formal Urban Development Agreement signed with the federal and provincial governments enabled the municipality to lever financial and technical resources from both public and private sector partners. With provincial government support for community economic development, the agreement made specific reference to the social economy in building sustainable inner city neighbourhoods and in providing economic opportunity for Aboriginal people.

Community Scale: Vibrant Communities Canada

(Community mobilization and local citizen engagement have been key drivers of the social and solidarity economy, *developing an alternative development agenda and forging policy relationships* with governments).

The pan-Canadian action-learning initiative, Vibrant Communities, illustrates a community-driven strategy for poverty reduction that is locally embedded and nationally connected. While the initiative was not designed expressly for the social and solidarity economy, its principles of inclusion and collaboration, its mechanisms of multi-level governance, and its community-driven practices all align with the social and solidarity economy. In some communities, such as Edmonton, concrete links to social economy ideas emerged through development of alternative investment strategies and financial products. Supported mostly by foundation funding with some government contributions, Vibrant Communities operated in 16 cities between 2002 and 2010, guided by five themes: comprehensive approach; multi-sectoral collaboration; community asset building; community learning; monitoring progress and sharing lessons through developmental evaluation. The institutional design also emphasized taking local innovations to scale. A Pan-Canadian Learning Community joined the 16 sites in sharing experiences and tapping outside expertise. Several collaborative mechanisms (Policy Dialogue, Government Learning Circle, Funders Network) transferred local poverty reduction lessons to policy makers and funders.

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