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## **Social and Solidarity Economy**

*Between Emancipation and Reproduction*

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## **Abstract**

Social and solidarity economy is increasingly attracting the attention of policy makers, practitioners and social scientists worldwide. For some it contributes to social cohesion, while addressing state and market failures; for others it provides an alternative model to current neoliberal development patterns; for its critics it is just another facet of contemporary capitalism.

The purpose of this paper is to critically examine social and solidarity economy, in light of these different trends, while also addressing the issue of market and state relations. The paper presents a theoretical reflection and an empirical comparative analysis from the cases of Brazil and Portugal, which illustrate the different trends and challenges that social and solidarity economy faces.

The main goal is to question whether social and solidarity economy is an emancipatory alternative or a product and instrument of the capitalist system, contributing to its reproduction.

## Introduction

Social and solidarity economy is not something new. Even if the label is recent and embodies a new framework, the idea of autonomy and self-management is present at least since the nineteenth century. Defourny and Develtere (1997) find its roots in the most ancient forms of human association, such as the primitive artisans' guilds in Africa and pre-colonial America.

However, in the last decades, the context of growing contradictions and failures in the dominant capitalist system opens up the space for different theories and experiences worldwide that proclaim social and solidarity economy as a form of resistance and an emancipation from neoliberal globalization, a pathway for a more equal and sustainable society. Numerous meetings, forums and networks of social and solidarity economy partisans and activists claim the integration of solidarity as a core principle for an alternative globalization. This can be seen, for instance, in the World Social Forums or within Rio+20 side events.

Long-standing mainstream debates confront the assets of a self-regulating market to the role of the state in the foundation of social organization and the delivery of social welfare. Social and solidarity economy proponents, instead, introduce another component of social life, which is neither the business sector nor the public one.

Our research is focused on the positioning of social and solidarity economy initiatives within a global restructuring context. The paper presents a theoretical reflection on social and solidarity economy and draws on preliminary empirical evidence from the cases of Brazil and Portugal.

The goal is to analyze the dynamics that characterize this "sector" in articulation with wider changes in the world-system, while questioning its role in the social transformation or reproduction. Is social and solidarity economy a counter-hegemonic and emancipatory alternative or is it a product and an instrument of the capitalist system, contributing to its reproduction? In this paper we provide some clues of analysis.

## Background

Historically, solidarity economy draws back to the social economy that emerged in Europe in the nineteenth century, as an attempt to face the individualism and competition of the political economy born in industrial societies. It is connected to the "social issue" and the emergence of new situations of poverty and social exclusion. Charles Gide (1905) defines it as the economy of the poor, those who remain outside the political economy.

According to this perspective, the aim was to fight poverty through a collective approach, in opposition to the dominant individualism. On the other hand, it also intended to address social needs through economy, thus the term *social economy*.

In its origin, the social economy involves both practical initiatives such as workers cooperatives, and philosophic and ideological debates and experiences, such as utopic socialism, anarchism, among others.

The concept of solidarity economy (from the french *économie solidaire*) only arises in the seventies of the twentieth century in a francophone European context, to designate new forms of social economy related to a new social issue, the worsening of poverty and social exclusion situations, as well as to new form of solidarity related to the environment, culture, citizenship, education, among others.

Hence, the term *social and solidarity economy* intends to refer both to the most traditional forms of social economy, among which the cooperative is considered the most representative one, and to the new experiences of solidarity economy developed worldwide in the last decades.

Therefore, the concept of social and solidarity economy can be defined as a set of organizations and initiatives where a collective patrimony is privileged against the individual return, based in democratic decision-making processes, and where the realization of economic activities aims not the distribution of profits (as in the business sector), but the satisfaction of collective purposes, namely related to employment, citizenship, environment, education, or culture.

This definition differs from that of strict *non-profit sector*, since there may be profit (as in the case of cooperatives), but it should be reinvested for collective purposes, so that the logic of the market should be subordinated to that of solidarity.

However, it is worth noting there is no consensual terminology and its acceptance varies according to national specificities. The boundaries are vague, which denotes the lack of theoretical foundations and empirical structuration.

Social and solidarity economy has been highlighted, both by scholars and its protagonists, as an alternative to capitalist domination and reproduction. In this sense, it can be theorized as part of the movement of “counter-hegemonic globalization”<sup>1</sup> (Evans 2008). However, there is a lack of systematic analyses within the academic literature. A large body of works on social and solidarity economy is driven by idealism and normative claims, often downplaying its limits and contradictions. In addition, the term social and solidarity economy in itself is not at all neutral and carries a set of valuations that deserve critical examination.

Are we talking about an idealized return to the community world, as defined by Tönnies’ *gemeinschaft* (2002) – human associations that reflect a shared social consciousness, in opposition to the competitive, individualistic and unequal relationships that characterize market society?

We rather prefer to conceptualize social and solidarity economy as a field, defined as a structured space with its own laws of functioning and its own relations of force (Bourdieu 1993). Hence, social and solidarity economy is a field of internal and external struggles, which should be investigated.

From Bourdieu’s theorization on social reproduction, we know that even emancipatory movements contain within themselves elements of reproduction. The existence of stable

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<sup>1</sup> Evans defines *counter-hegemonic globalization* as “a globally organized project of transformation aimed at replacing the dominant (hegemonic) global regime with one that maximizes democratic political control and makes the equitable development of human capabilities and environmental stewardship its priorities” (Evans 2008: 272).

social patterns over long periods demands examining the ways in which social patterns are re-created in social action (Bourdieu 1977).

## **Social and solidarity economy in Brazil and Portugal**

Brazil and Portugal illustrate different dynamics in these processes.

Portugal is a Southern European country, in the semi-periphery of the world-system, with a fragile welfare state (Santos 1985). The emergence of social and solidarity economy is dated from the nineteenth century. Portugal was particularly influenced by the British ideas and experiences, so that the second cooperative law in the world is the Portuguese and the first Portuguese cooperative was created in 1858 (Leite 2011: 1), only fourteen years after the Rochdale Pioneers. However, the relatively low degree of industrialization and urbanization and the strong presence of the Catholic Church have prevented these movements from reaching a development as strong as in other European countries (Quintão 2011: 8).

After the Portuguese Revolution in 1974, it followed a period of intense democratic initiatives. The new forms of civil society organization that emerged in this period were related, on the one hand, to the recovery of the fundamental rights and freedoms that sustain the democratic state (such as political associations and unions) and, on the other hand, to initiatives addressing basic social needs (such as housing<sup>2</sup>, education, community development), together with an explosion of new cooperatives (Quintão 2011: 12).

The dynamism of this period was followed by a period of restraint associated with the economic crisis in the end of the seventies. The entry of Portugal in the European Union in 1986 opens space for greater influence of the European context in the Portuguese social and solidarity economy, namely through different European programs and networks.

A study by Salamon et al on the Portuguese *non-profit sector* concludes that “the overall size of the sector is relatively small in comparison to other industries and other developed countries” (2012: 7). In addition, a distinctive Portuguese feature in comparison to other countries is “the unusually large share of organizations that provide social assistance” (Salomon et al 2012: 8).

The debates on social and solidarity economy in Portugal have been particularly encouraged by Amaro. This scholar has developed a holistic concept of solidarity economy based on the experiences developed in Macaronesia – region composed by a group of islands in the Atlantic Ocean (the Portuguese archipelagos of Azores and Madeira, the Spanish Canary Islands and the archipelago of Cape Verde):

The economy that re-finds Life in its various dimensions, promoting a logic of systemic solidarity with Life in all its expressions (human beings, other living

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<sup>2</sup> An emblematic and radical experiment in participatory architecture from this period was SAAL (Mobile Service for Local Support). See, for instance, Santos, B.S. and Nunes, J. A. (eds.) 2004. Reinventing Democracy: Grassroots Movements in Portugal. *South European Society & Politics*, Vol. 9, No. 2; or, in Portuguese, Bandeirinha, J. A. 2007. *O Processo SAAL e a Arquitectura no 25 de Abril de 1974*. Imprensa da Universidade de Coimbra.

beings and abiotic components) and considering, in an integrated manner, the economic, social, cultural, environmental, territorial, scientific and political perspectives in which it translates. (Amaro 2009: 22; my translation)

Based on Macaronesia's experiences, Amaro systematizes solidarity economy around eight dimensions: (1) an *economic project*, involving the production and sale of goods and services; (2) a *social project*, promoting social inclusion and cohesion; (3) a *cultural project*, respecting and promoting cultural diversity; (4) an *environmental project*, valuing and protecting the environment; (5) a *territorial project*, mobilizing endogenous resources and capabilities and promoting local development; (6) a *management project*, involving the adoption of specific management methods; (7) a *knowledge project*, constantly monitoring and learning from the experience; (8) a *political project*, based on democratic principles, at the internal level, and on shared governance and co-responsibility, at external level.

This multidimensional approach focuses on the potential of social and solidarity economy in terms of a holistic and integrated development model. According to the author, it aims at integrating the economy with all aspects of life, acting as a factor of social and human development. Empirically, it tends to be related to a welfare-mix, complement to the private and public sectors, and its main protagonists are, perhaps, development agents and Local Development Associations (ADL).

Namorado (2009), referring to the Portuguese case, says that the social and solidarity economy “works within capitalism, albeit it follows a different logic from the capitalist logic. (...) its subordination within capitalism does not prevent it from having the alternative energy needed to be conceived as part of a post-capitalist horizon” (Namorado 2009: 69; my translation).

Differently, in Brazil, social and solidarity economy is clearly advocated as an alternative to the social and work relations of capitalism, characterized by exploitation, competition and commodification. Singer, its main protagonist, defines it as “an other mode of production, whose basic principles are the collective or associated propriety of capital and the right to individual freedom” (Singer 2002: 10; my translation).

In recent years, Brazil has evolved from a periphery of the world-system, “whose historic function was to provide elements for capital accumulation in the center” (Oliveira 2003: 126; my translation) to a clear insertion in the new global capitalism, with impressive growth rates that rendered the country an “emerging market”. However, this newly advanced economic development occurs in an extremely unequal society, in which it prevails a large part of the population living in poverty and a precarious working class. This is a fertile ground for the emergence of social and solidarity economy:

In Brazil the idea of building solidarity economy, especially from the nineties, is emphasized through the large number of associative experiences that are organized by workers in urban and rural areas, in different economic and social contexts, along with experiences of bankrupt companies that are recovered by workers; formal or informal community groups and associations; associations and cooperatives formed by family farmers and agrarian reform settlers; urban cooperatives (labor, consume and services); solidarity finance, among others.

Given this context, the social movement of solidarity economy, in Brazil, is organized together with the popular movements for the country's democratization and gain visibility from the nineties. (SENAES 2011: 12-13; my translation)

Today in Brazil there is a clear recognition and a widespread use of the concept of solidarity economy.

It is interesting to notice that, while in some places, as in Portugal, the terms social and solidarity economy and third sector are used as analogous, in Brazil, there is a clear distinction between them. The charter of principles from the Brazilian Forum of Solidarity Economy clearly diverges from the third sector stating that it replaces the state in its social obligations and inhibits workers emancipation as active protagonists of their own rights. According to its proponents, the third sector is considered a state partner, which develops top-down approaches. On the contrary, solidarity economy should be grass-rooted and its main characteristic is the workers' autonomy and self-management.

According to the Brazilian perspective, the main focus is on the production sphere. Therefore, the main protagonists of social and solidarity economy are the workers seen as historical subjects in social transformation, defending in a militant way a new mode of production and wealth distribution. Self-management and the productive character are essential features of the initiatives, which is not so much the Portuguese case. In addition, it is also close to unions and the labor movements.

Many initiatives are linked to attempts to fight against unemployment and to guarantee income for workers made redundant in the labor market, such as in the case of former companies recovered by workers under self-management. In fact, the main reason stated for the creation of solidarity economy initiatives in Brazil is the "alternative to unemployment" (SENAES 2007).

In Brazil, there is a stronger common identity among solidarity economy actors, namely through the existence of a consensual term, a common Charter of Principles, a national forum and regional forums, and a public body for solidarity economy, the National Secretariat of Solidarity Economy (SENAES), that do not exist in the Portuguese case. This stronger identity is also noticeable in the main protagonists, the workers, as well as in the clear opposition to capitalism, the social adversary.

The Brazilian National Secretariat of Solidarity Economy also recognizes solidarity economy as a strategy of local and territorial development (SENAES 2011: chapter 2), particularly related to specific communities such as *Quilombos*<sup>3</sup>.

Nevertheless, drawing on Lima's work (2004) on cooperatives, it is possible to identify another trend in the development of Brazilian solidarity economy which is clearly business oriented: a set of initiatives promoted by businesses, firms and the state that use the form of solidarity economy with the objective of lowering costs, acting as sub-contractor for private companies or as providers of public services. Lima identifies the case of fake cooperatives that adopt such form to benefit from tax exemption and other subsidies from the state.

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<sup>3</sup> Settlements founded by people of African origin, mainly escaped slaves, in the seventeenth and eighteenth centuries



Both Brazil and Portugal have specific legislation for the sector. Brazil has not a unique bill of social and solidarity economy but many regional and municipal laws, while the Portuguese parliament has recently approved the bill on social economy (2013) which strengthens its consecration within the country's legal system. The text defines "social economy" as the set of economic activities freely developed by entities whose mission is to pursue the community's general interests, either directly or through the interests of its members, users and beneficiaries (article 2). Portugal only recognizes formal organizations, while Brazil also includes informal groups.

In terms of national accounts system, in 2011 social economy in Portugal was recognized through the *Satellite Accounts of Social Economy*. Brazil has developed the *Solidarity Economy Information System* (SIES).

Table 1 shows the predominant organizational forms of social and solidarity economy in the two countries.

Table 1. Prevailing organizational forms

| Brazil                          | Portugal  |
|---------------------------------|---|
| Associations (52%)              | Associations and other social economy organizations (94%) |
| Informal groups (36%)           | Cooperatives (4%)   |
| Cooperatives (10%)              | Foundations (1%)  |
| Other organizational forms (2%) | Religious brotherhoods [ <i>Misericórdias</i> ] (0,7%)    |
|                                 | Mutual companies (0,2%)                                   |

Source: SENAES 2007 and INE 2010.

In recent years, different platforms have emerged to represent the social and solidarity economy actors. In Portugal the Cooperative António Sérgio for the Social Economy (CASES) and the National Council for Social Economy (CNES) were created in 2010 through state initiative. A second level organization that has been particularly active in fostering the debates and initiatives of social and solidarity economy is ANIMAR – Portuguese Association of Local Development.

In Brazil, many municipalities and states also present great vitality in promoting solidarity economy through a wide range of initiatives, along with the support of university incubators and second level organizations, such as ANTEAG (National Association of Workers in Self-Managed Enterprises), CONCRAB (National Confederation of Brazilian Agrarian Reform Cooperatives) and UNISOL (Union of Cooperatives and Solidarity Enterprises).

## Models of Welfare State

Considering the typology of welfare-state regimes built by Esping-Andersen (1990, 1999), three different models are defined according to the concept of "de-commodification" and the way the production of welfare is distributed between the institutions state, market and family. The concept of "de-commodification", derived from Polanyi, relates to the entitlements individuals have independently of market participation (Esping-Andersen 1999: 43).

State, market and family assume, in different contexts, varying degrees in the allocation of resources. Therefore, "some regimes, in particular the liberal, Anglo-Saxon, are market-biased; others, especially the Southern European or the Japanese, are powerfully *familialistic*. And still others put the accent on the state delivery of welfare" (Esping-Andersen 1999: 5).

Despite the criticism that followed *the three worlds of welfare capitalism*, together with proposals of alternative typologies, this framework is useful to approach social and solidarity economy under the various trends of welfare state.

The social-democratic model is based on a broad reliance on the universalist state for the delivery of welfare. It is particularly found in Scandinavian countries, where “associations have exerted social pressure by acting as a channel through which to voice demands and they have mobilized networks to foster the delivery of services by public organizations. These services are the responsibility of government” (Laville et al. 2000: 128).

The liberal model, typical of Anglo-Saxon countries, privileges a loosely regulated market, where public authorities provide weak services, concentrated on the most disadvantaged sectors of the population. This model tends to develop market-oriented forms of social and solidarity economy in which the generation of revenue is a central part of the initiatives.

In both the social-democratic and the liberal model, the role of social and solidarity economy is limited, albeit for opposed reasons:

In the universalist model, there is a strong impetus to create services and take over tasks by the public authorities that were formerly performed by the private sector. In the liberal and dual models<sup>4</sup>, public service delivery is limited, and services are for the most part the responsibility of women and remain in the private sector... (Laville et al. 2000: 128)

Finally, the conservative model is centered in the role of family, while the state only intervenes marginally. Esping-Andersen (1999) examines the family unit as welfare producer, where social and solidarity economy would be included. Therefore, in this welfare state regime, a significant role is assigned to social and solidarity economy, which emerges in articulation with the state responsible for providing a considerable portion of the funding.

The State sets rules for service-delivery procedures as well as for the occupations of salaried workers in the sector. If the rules are followed, funding is provided through redistribution. In Germany, Austria, France and Belgium, associations were more like service pioneers, identifying emerging social requirements and then responding to them within their own associative contexts while at the same time being regulated by the State. Conglomerates of organizations took shape, grouped together in national association federations that interacted with the public authorities. The establishment of a regulated service regime gave rise to a non-market isomorphism of *Third System* structures that brought them closer to government and prompted them to form large national federations” (Laville et al. 2000: 128-129; italics added).

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<sup>4</sup> The authors consider that weakness in the delivery of public welfare services is also characteristic of the dual system of Southern Europe, such as in Spain, Italy and Portugal: “This system emphasizes monetary transfers, neglects services, and provides social insurance for those who have successfully integrated into the labour market at the expense of groups who do not have employment security, have little hope and who are trapped in the underground or informal economy” (Laville et al. 2000: 128).

In Portugal and Brazil the welfare state is weak, which, to some extent, is mitigated through articulation with other forms of societal welfare. In both countries, economic restructuring and the adoption of neoliberal policies have resulted in the privatization of state companies and flexibility of the labor market.

The analysis on the way the production of welfare is distributed between the institutions state, market and family allows identifying two main roles of social and solidarity economy in the countries. One trend, very strong in Portugal, is the outsourcing of welfare policies to social and solidarity economy organizations, regulated and partially financed by the state. This is the case of the Portuguese CERC (network of Cooperatives for the Education and Rehabilitation of Handicapped Children) and IPSS (Private Institutions of Social Solidarity). Another trend, more present in Brazil, is that of social and solidarity economy initiatives centered in the economic activity, such as cooperatives, which operate in the market and are exposed to its rules.

In addition, both countries face the challenge of the incorporation of social and solidarity economy by the state. This trend is seen as a conquest of additional support, but also as a moderation of the initial emancipatory claims.

## **Social and solidarity economy and the world order**

Another entry point for the analysis of social and solidarity economy as a counter-hegemonic project is to examine it in relation to the world order and its system of domination.

According to the world system theory (Wallerstein 1984), the world system carries a hegemonic configuration. Currently, this hegemonic global regime is neoliberalism:

It continues to be a system in which the superiority of market allocation is ideologically unquestioned by dominant elites. It continues to be a system in which the rights of capital are the most important foundation of economic and political power. (Evans 2008: 276)

While the states of the periphery suffer the most harmful consequences of global capitalism, the central states benefit from that same system (Wallerstein 1979). Therefore, “central countries” tend to be a sphere of dominance and reproduction, as they are more consonant with the dominant system, while “peripheral countries” tend to be more resistant and counter-hegemonic, as it is argued to be the case of Latin American countries.

Favreau and Fréchette (2002) analyze social and solidarity economy with consideration to the features specific to the South. The authors argue that, throughout the twentieth century, the worsening economic crisis, the restructuring imposed by the International Monetary Fund on most countries in Africa, Latin America and Asia, the phenomena of poverty and social exclusion, among others, left their governments with a limited scope in terms of their redistribution function, which results in the emergence of different bottom-up initiatives, based on the solidarity among different social groups in an attempt to solve their own problems.

Social and solidarity economy in Brazil has emerged from a periphery setting, occupying a counter-hegemonic space, in resistance against the dominant political, economic and cultural powers, while in Portugal, in its semi-periphery, it is

complementary to such powers. However, considering the international changing order, we question, on the one hand, how the rise of Brazil and its new geo-political-economic centrality and, on the other, the economic recession of Portugal, and the consequent implementation of severe spending cuts, will transform the dynamics of social and solidarity economy.

The issue is that of the power of social and solidarity economy to challenge neoliberalism and the consequences of its expansion, as it becomes increasingly embedded in relations with state and market actors. What challenges and contradictions does this pose to social and solidarity economy?

## **Capitalism, precariousness and social and solidarity economy**

Inequality and precariousness are main features of capitalism, accompanied by the dominance of capital in the foundation of economic and political power. Therefore, in order to be a true alternative to this system of domination, the experiences of social and solidarity economy would not be characterized by precariousness, nor replicate asymmetric or oppressive relations.

From the point of view of work organization, unlike Taylorism or lean production, in which the workers are detached from the product of their work, social and solidarity economy has the advantage of being based on the workers self-management, autonomy and collective ownership.

However, on the ground, we find many initiatives that do not provide suitable conditions of social protection for its workers and reproduce the asymmetric relations of capitalism. Even the Mondragon Cooperative Corporation, which is taken as a case of success within the cooperative movement, in its strategy of international growth has adopted relocation practices, exploiting cheaper labor, lower social protection duties, lax environmental rules, etc. (Errasti and Mendizabal 2007).

Moreover, according to some critics, the development of new forms of social and solidarity economy as a consequence of the capitalist crisis has broken with “the universality of policy in favor of fragmented collective identities, abolishing the struggle for social rights and the political positioning based on the perspective of class” (Wellen 2012: 172; my translation).

If on the one hand, market fails to deliver social protection and collective goods (Evans 2008), on the other, the transfer of public welfare to social and solidarity economy organizations means, to some extent, a loss in the social rights achieved from decades of working class struggles, turned into private and precarious services:

This process promoted a breach in the universality of public services, since only people who do not have financial conditions to afford private services would benefit from private social organizations. (...) What used to be a universal social right becomes a favor, not a right. (Wellen 2012: 171; my translation)

This results in the establishment of a new ideology of self-accountability, which, to some extent, legitimates the capitalist mode of production, exchange and consumption.

Are we in presence of a genuine solidarity and a true project of social change, or a forced solidarity as a means of adaptation to the capitalist crisis?

## **Emancipation versus reproduction**

Social and solidarity economy, in Portugal and Brazil, faces a struggle between its project of social emancipation and the dominant social patterns to which it adapts, thus contributing to its reproduction.

If, on the one hand, the counter-hegemonic trend is present, on the other, the analysis shows that some developments of social and solidarity economy end up as alternative forms of the capitalist business world.

Therefore, we envisage the development of social and solidarity economy in three ways.

One is *market oriented*, comprising initiatives that adopt forms of social and solidarity economy with the objective of lowering costs, benefiting from tax exemption and other subsidies from the state, or acting as sub-contractor for private companies or as providers of public services. A related version of this trend is linked to initiatives developed strictly to fight against unemployment for the surplus workers in the labor market, without an associated educational and political project. Many of these initiatives do not provide suitable conditions of social protection for its workers, are characterized by precarious labor and, eventually, replicate the asymmetric relations typical of capitalism. In this case, social and solidarity economy is just another facet of contemporary capitalism.

Another trend is the development of social and solidarity economy as an approach or a *methodology of local development*. In this perspective, it is complement to the state and the market, contributing to social cohesion, while addressing state and market failures. The issue here is that often the projects are not discussed with its basis. Therefore it is essential the strategy of associative vitality in terms of their bases and renewal of leaders, for an effective shared and participatory construction.

Finally, a third trend is present in grass-roots initiatives that embody a conscious *project of social transformation*, aiming to develop forms of resistance to neoliberal globalization and to attack the power of capital. In spite of the many challenges they face, they put into practice the principles of self-management, autonomy and collective ownership, prefiguring “the democratic management of collective affairs that must be central to any progressive alternative institutional architecture” (Evans 2008: 276).

The different experiments either integrate the conscious construction of an emancipatory project or they are absorbed by the mainstream system of domination and become an instrument for its reproduction.

Many of the questions raised in this paper are still unanswered, but that is the challenge opened for future research.

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