

SOCIAL ECONOMY IN ROMANIA – FROM CONCEPT TO PRACTICE

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As a consequence of intensifying funding for social economy, the number of researches, publications and debates on social economy's role and the awareness of the concept have increased. The main sources of funding have made an important contribution to how the social economy is understood and the development of this field in Romania. Based on the institutionalist theories according to which the development of the social economy and the organization and functioning of its entities depend on the economic, social and institutional context in which they operate (Kerlin, 2017; Rueshemeyer, 2009; Teasdale, 2012; Sepulveda, 2015), this article analyses the development of the social economy sector in Romania. The research question to which the article attempts to provide answers addresses the relationship between the definition of social economy and social enterprise and the subsequent development of these entities in Romania. Despite of intense efforts to define the social economy and legislation of the sector in recent years, the results of the research analysed in the paper indicate a lack of consistency, still present at national level, regarding the understanding of the social economy and social enterprises. Limiting the social economy sector especially to its role in social inclusion has led to its development especially in this area. Based on a background analysis of the data gathered in 2013 through a mix of qualitative and quantitative methods, the article presents an analysis of the degree of knowledge of the term, the defining characteristics of social enterprises and their main contributions, and, at the same time, draws attention on the tendency to underestimate the role of the social economy in social and economic development.

Keywords: social economy; social enterprises; social inclusion; vulnerable groups.

INTRODUCTION

Social economy is an area that has been constantly growing across the European Union in recent years, gaining more interest after the recognition of the role played by social economy entities in addressing current social and economic

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needs, ensuring social cohesion, and fostering inclusive growth. This trend has led to an increase in the number of studies/reports/analyses (Defourny and Nyssens, 2012; European Commission, 2013; European Commission, 2015; Galera and Borzaga, 2009; Roelants et al., 2012; European Economic and Social Committee, 2017; Kerlin, 2017), intended to provide an understanding of the sector and its size, while also contributing to the institutionalisation of social economy at the EU level (Social Business Initiative, 2011) and in many EU countries (Spain, Greece, Portugal, France, Romania, Poland) (European Economic and Social Committee, 2017).

In a context characterised by an increase in funds available for the development of social economy, in debates related to its role in reducing social exclusion, in the number of research studies and publications focused on social economy, the article analyses the way relevant professionals see the development of this sector, with emphasis on understanding the term, as well as the defining characteristics of social economy organisations. Drawing on the findings of social economy research conducted in 2013 and on a brief overview of the main funding sources available for social economy in Romania from 2007 to 2013, the article draws attention not only to a tendency to restrict the meaning of social economy to the social inclusion of vulnerable groups, but also to the consequences of this limitation: inequitable allocation of resources (in particular to work integration social enterprises), reduced willingness of certain organisations to be part of this sector (e.g., worker cooperatives), uneven development of organisations in the field.

Relevant perspectives

Social economy is the framework concept reuniting various types of organisations which combine social (including environmental) purposes with commercial purposes and whose work is guided by principles such as self-reliance, solidarity, social relevance (Amin, 2009; Pearce, 2009; Laville, 2009; Jones and Keogh, 2006; Bidet, 2010). Besides duality of purpose, social economy organisations are characterised by participatory governance and limited distribution of profits (Amin, 2009; Borzaga and Defourny, 2001, Sepulveda, 2015). The best known are cooperatives, mutuals and non-governmental organisations, with a long history in the European society and beyond that, going back to the 19th century. Social economy features are found in these organisations to a different extent, namely the social purpose of their work may not always be explicit or may be limited to promoting members' interests (see traditional cooperatives), participatory governance is provided by a single type/homogenous group of members and not by involving various stakeholders from within and outside the organisation, and the entrepreneurial

dimension is developed to a greater (cooperatives) or smaller extent (non-profit organisations) (European Commission, 2016).

Research on social economy organisations helped develop the concept of social enterprise, which places greater focus on the explicit social purpose of the activities carried out, the heterogeneity of members involved in governance, and provision of benefits not only to members, but also to larger communities (Lambru, 2013; Sepulveda, 2015; Borzaga and Defourny, 2001; Defourny and Nyssens, 2010; Defourny and Nyssens, 2017; Baglioni, 2017). The framework used to analyse social enterprises looks at social innovation (social enterprises are forms of social innovation meant to address existing needs following state or market failures), dependence on resources (non-profit organisations that run business activities to support their mission, with social enterprises being considered tools/strategies in that endeavour), or the application of characteristics/principles that are specific to a regulatory approach (the EMES approach) (Defourny and Nyssens, 2010; Teasdale, 2012; Dees and Anderson, 2006).

The development of social economy, as well as the organisation and operation of its entities depend greatly on the economic, social or institutional context in which they operate (Amin, 2009; Sepulveda, 2015; Lambru, 2013; Baglioni, 2017; Mazzei, 2017). Based on theories of historical institutionalism, the variety of organisational forms taken by social enterprises may be explained by reference to formal institutions (public institutions, national and international public policies, law-making procedures, power relations, etc.) and informal ones (rules, values) found in different socioeconomic and political contexts (Kerlin, 2017; Rueshemeyer, 2009; Teasdale, 2012; Sepulveda, 2015). In Central and Eastern European countries, the communist regime influenced the work of these entities, disrupting their natural evolution by banning or restricting their business (as in the case of non-profit organisations), forcefully taking over/assimilating some of them into centralised economy (cooperatives), demutualising or setting up quasi-social economy organisations (as in the case of mutuals) (Les and Jeliaskova, 2007; Hausner, 2009; Praszkiec et al., 2017; Rakic et al., 2017; Lambru and Petrescu, 2017; Lambru and Petrescu, 2014; Lambru and Petrescu, 2014). The influence exerted by the European Union (specific lines of funding, public policies) on the development of the social economy sector and social enterprises has made Central and Eastern European countries attach higher importance to this field starting with 2004 (Poland, Hungary, the Czech Republic), or 2007 (Romania and Bulgaria). In many of these countries, the importance attached to the sector has also led to its institutionalisation based on different models, with social enterprises being considered public policy instruments in numerous areas, such as social inclusion, employment, service delivery, or community development (European Commission, 2016; Sepulveda, 2015).

At European level, there are two approaches to the social enterprise concept (European Commission, 2016; Borzaga et al., 2014): the most common one uses

a more comprehensive definition of social enterprise, focused on setting the characteristics of these entities, whereas the other one employs the definition which restricts the concept to organisations pursuing social inclusion purposes (e.g. work integration social enterprises). The first perspective considers not only the work integration of people from vulnerable groups, but also the impact of social economy activities on community development, social cohesion and solidarity, social innovation, co-production, or new types of enterprises (social enterprises) (Borzaga and Galera, 2012; Defourny, 2014; European Commission, 2013; Evers et al., 2014; Pestoff, 2014; GECES, 2016; OECD and European Union, 2013; European Commission, 2015).

The extended definition, which is widespread in states that have a long tradition in the field of social economy, includes private organisations which promote social purposes, alongside economic pursuits that are not limited to the social inclusion of vulnerable groups, which have a participatory governance system and distribute the profit/surplus based on actual work, not on invested capital, in order to generate welfare gains for a greater number of people, not only for investors (European Commission, 2013; European Economic and Social Committee, 2012; Defourny and Nyssens, 2012). In this approach, the main types of organisations considered to be social economy entities are non-governmental organisations, cooperatives, mutual aid associations/mutuals. Not all social economy entities qualify as social enterprises, as this category comprises organisations that run business activities to accomplish their social mission (Kerlin, 2006; Kerlin, 2013; Teasdale, 2012; Sepulveda, 2015; Defourny and Nyssens, 2010) and meet certain criteria grouped into three dimensions: economic dimension (taking economic risks, running constant business activities for the production of goods and/or services, employing a minimum number of workers), social dimension (set up as an initiative of a group of people or institutions having a clear social purpose, limited distribution of profits) and participatory governance (high autonomy, decision-making involvement of members independently of the share capital they own, and decision-making involvement of the stakeholders affected by the activities of the enterprise) (Defourny and Nyssens, 2012).

The tendency to put the spotlight on social economy during social inclusion debates is mostly common to the European states where the sector has been developed mainly through grants (Borzaga and Galera, 2016). Even if numerous lines of funding aimed at improving the condition of people belonging to vulnerable groups by building their entrepreneurial skills or integrating them into the labour market, the difficulties encountered during their “entrepreneurial activation” or the need for a financial capital to start a social enterprise are just some of the arguments challenging the approach that sees social economy as being addressed exclusively to the most vulnerable members of the society. Moreover, approaching social economy as an active social inclusion measure, like the authorities of these states – including Romania – did, is restrictive and may often

lead to conceptual confusion for both decision makers and the representatives of relevant organisations or experts.

In Central and Eastern Europe, despite specific lines of funding intended for the creation of social enterprises, social economy is relatively unknown or mainly associated with the social inclusion of vulnerable people (European Economic and Social Committee, 2017; European Commission, 2015; European Commission, 2016). For instance, in countries like Romania or Poland, the social enterprises which are regulated by public policies and benefit from tax concessions are those seeking to ensure the work integration of vulnerable people (work integration social enterprises – WISEs). In the 1990s, this type of social enterprise focusing on the work integration of vulnerable people at risk of exclusion was the most widely spread in Europe as a result of a development approach aimed at employment growth (Deforuny and Nyssens, 2010; Nyssens, 2006). These WISEs were supported via different public policy schemes in some EU countries, which enabled their advancement. Nonetheless, analyses of social enterprises contributed to their development in other areas as well (service delivery, community development, etc.).

Consequently, EU countries continue to show an uneven understanding and knowledge of social economy and social enterprise concepts (European Commission, 2015; European Economic and Social Committee, 2017; European Economic and Social Committee, 2012). Paired with local factors, this has a direct influence on the institutionalisation of social enterprises in the Member States and contributes to an inconsistent development of the sector.

Social economy in Romania

The attention paid to social businesses, promoted as alternatives to capitalist firms that only seek to maximise profit, has intensified across Europe against the backdrop of economic crises and, in the past few years, private donors (companies, but also non-profit organisations) have also supported the creation of such businesses in Romania via project competitions, as part of corporate social responsibility strategies or social innovation efforts aimed at sustainable community development.

At the same time, ‘social economy’ is a term that has become more popular in recent years, particularly as a result of the substantial funding provided for the development of this sector. Funding efforts were followed by an intense rhetoric on the role of social economy in reducing social exclusion and ensuring the work integration of people from vulnerable groups, as well as by more research in the field (Neguț, 2013; Stănescu, 2013). Academia got actively involved in various social economy research studies conducted on a national level, in comparisons with other European countries and steps to define the concept based on Romanian realities, as well as in sectoral analyses regarding different types of social economy

entities. The first studies that defined the concept and the characteristics of social economy entities while also analysing various entities active nationwide were conducted by the Research Institute for Quality of Life – RIQL (Arpinte et al., 2010; Cace et al., 2010) and were later used to develop public policies in the field (Social Economy Law, National Strategy on Social Inclusion and Poverty Reduction, Operational Programme for Human Capital).

NGOs are the ones that have promoted the social economy concept in Romania ever since the 2000s and have pleaded for a dedicated legal framework (Lambriu and Petrescu, 2012). The Coalition for Social Economy, founded in 2011 as an NGO initiative, counts 58 organisations which attended public consultations and were active partners to public authorities during the effort to develop a legal framework for social economy. The Coalition for Social Economy campaign meant to influence public policy in this particular sector sought mainly to clearly define the three areas regulated by law (social economy, social enterprises, and WISEs), to set clear criteria for certifying an organisation as a social enterprise/WISE, to introduce a minimum package of tax concessions for social enterprises/WISEs, to create adequate mechanisms fostering dialogue between public authorities and the social economy sector so as to facilitate the development of the latter. Public authorities (the Ministry of Labour, Family, Social Protection and the Elderly) started the institutionalisation of social economy in 2010, but they got stuck in the phase meant to clearly define the concepts and characteristics of the entities to be included in this sector. Given the restrictive understanding of social economy as a means to improve the employability of people from vulnerable groups, the final version of the law – adopted in 2015 – focuses primarily on work integration social enterprises, which are also given certain incentives.

Although mutual aid associations (MAAs) have taken an active part in the debates concerning this field and have even benefited from social economy projects after 2014, they were less involved in the initial sector development stage in Romania, due to a limited understanding of the concept and, hence, of their belonging to this sector. Even if they were following social economy principles, MAAs defined themselves as institutions pursuing exclusively commercial purposes, not social objectives. Pensioners' mutual aid associations were more open to being included among social economy entities given that they were also offering social services to their members, and the lending business supported the social activities carried out for members. This didn't happen with employees' mutual aid associations, which were in the process of market repositioning after a decline in membership. Research related to these organisations (Stănilă et al., 2011; Lambriu, 2013) provided better knowledge about them and contributed to their inclusion among the social economy entities stipulated by law. Mutual aid associations are the social economy entities most familiar to the public (Arpinte et al., 2010) and the most dynamic ones in terms of social pursuits (Lambriu and Petrescu, 2016).

Cooperatives are the social economy entities least involved in the development of public policies specific to this field, since they don't identify with the principles that define social enterprises. Their failure to understand the concept has fuelled a wrong perception of social enterprises as entities owned by disadvantaged or poor people, something that could have a negative impact on the image and work of cooperatives (Petrescu, 2013; Lambriu and Petrescu, 2014). Therefore, representatives of cooperatives do not want these to be considered social economy entities, but economic operators seeking to make a profit, not to advance a social purpose. Nevertheless, a number of newly founded cooperatives (e.g. Vidra Cooperative, CoopNet, Manufactura Horezeană) identify as social enterprises (www.ies.org.ro). This type of cooperatives has developed with the support of local action organisations or groups, especially in the farming or traditional craftsmanship sector.

Considering that public policies focus on social enterprises as forms of social inclusion, we expect Romania, like other Central and Eastern European countries, to witness a limited understanding of the social economy concept among the representatives of the entities belonging to this sector. The fact that the social economy term is restricted to the social inclusion of vulnerable people is also due to the specificity of the activities funded under grant projects, especially by the European Social Fund (ESF), and to the rhetoric about the role of social economy in creating jobs and, ultimately, in reducing social exclusion. Priority Axis 6 of the Sectoral Operational Programme for Human Resource Development 2007–2013 (SOP HRD) was aimed at boosting training so as to develop the skills of people belonging to vulnerable groups – with a focus on the Roma minority, persons with disabilities, formerly institutionalised youth, and women –, creating jobs for people from these groups, and training experts in the field of social inclusion with a view to improving their skills to work with/for vulnerable people.

The period witnessed persistent confusion about the definition of the term despite extensive research in the field (105 volumes between 1994 and 2013). A significant increase in the number of Romanian publications on social economy was first reported in 2010 (15 volumes compared with four in the previous year), when the findings of the first relevant studies conducted as part of ESF-funded projects were published. Many of these publications tackled social economy in terms of its potential to ensure the social inclusion of vulnerable groups, as required in the guides for applicants (Stănescu, 2013).

Structure of social economy opportunities in Romania

Starting with 2007, the rise in funding sources available for social economy has spurred the popularity of the concept and the number of social economy entities. As European funds were mostly intended for the development of

employment instruments, many non-governmental organisations saw the public resources provided for social economy development as an opportunity to finance the inclusion of vulnerable groups and to build self-sustainability capacities or to develop new social services (NESsT, 2011). The main sources of funding available for social economy at national level were the European Social Fund (ESF), through the Sectoral Operational Programme for Human Resource Development 2007–2013 (SOP HRD, Priority Axis 6, KAI 6.1 ‘Social economy development’), NESsT, PACT Foundation (PACT for COMMUNITY Programme), OMV Petrom (‘Made in Andrei’s Country’ Programme), the Romanian-American Foundation (Rural Entrepreneurship Programme, Green Entrepreneurship Programme), each with a different approach to the sector and even a different terminology. Whilst SOP HRD documents use the term “social economy structure”, other donors (e.g. NESsT or OMV Petrom) use words like “social enterprise” or “social business”. With a financial allocation of EUR 644 million for Priority Axis 6 – Promoting social inclusion, SOP HRD was the biggest funder of social economy (AMPOSDRU, 2017: 23). In this programme, key indicators of efficiency and attainment of employment or social inclusion objectives were the number of social economy structures set up and the number of newly created jobs, whereas NESsT competitions focused on capacity building for the development of sustainable social businesses.

To NESsT, which held five grant-making rounds and supported 28 projects (18 projects in the period 2007 to 2014 and ten in the period 2015 to 2018), social enterprises are financially sustainable businesses created to further a social purpose, aiming to address a social problem in an innovative way (NESsT Europe, 2011). This approach places an emphasis on building and/or developing entrepreneurial skills within organisations, allowing them to strengthen their economic features, in order to be able to support their activities and service delivery after initial funding stops.

With its ‘Made in Andrei’s Country’ programme, run in partnership with NESsT, OMV Petrom supported social business development in disadvantaged local communities. For two editions, held in 2013 and 2015, funding was granted to 20 of the 680 business ideas registered for the competition, whose overall budget was only EUR 350,000. The programme was inspired by the social business development philosophy of NESsT, emphasising the entrepreneurial factor and the social impact of the enterprise, with importance attached to the economic and social benefits generated for the community.

The programmes developed by PACT and the Romanian-American Foundation focused on the role played by social enterprises in community development, regarding them as forms of collective action contributing to the welfare of their communities/micro-regions. Those programmes targeted mainly rural areas and a major aspect was the association of community members.

METHODOLOGICAL ASPECTS

This paper draws on the data collected during the *Inclusive-Active-Efficient* (IAE) project in 2013, using a mix of quantitative and qualitative research methods and techniques: a questionnaire-based survey among representatives of social economy organisations and in-depth interviews with relevant key informants.

The questionnaire-based survey targeted organisations that met the underlying criteria of social economy entities, according to the extended definition mentioned earlier (non-governmental organisations, mutual aid associations, cooperatives, religious organisations, companies), from three development regions of Romania (Northeast, Southeast, and Bucharest-Ilfov). Regions were selected based on both the level of development (poverty rate, unemployment rate, GDP per capita) and the number of social economy entities. The Northeast and Southeast are two of the poorest regions in Romania, but they have a large number of cooperatives (the Northeast has the highest number of cooperatives – 432) and mutuals (the Southeast has the highest number of mutuals – 150) (Petrescu, 2014). Bucharest-Ilfov is the most developed region of Romania, with a significant number of NGOs (4 362), cooperatives (81), and mutuals (109). The fact that the survey was conducted in only three of the eight development regions of Romania was a research limitation, but we tried to compensate with additional information gathered during the qualitative survey, which included actors familiar with the national evolution of the sector.

The questionnaire was applied face to face, at the premises of those organisations, and included items that tackled the following aspects: organisational profile and services delivered, support from the authorities, access to European funds, perceptions of social economy. The section related to perceptions focused on familiarity with the social economy concept, with the types and defining characteristics of the organisations that could qualify as social economy entities, as well as on their most significant contributions. The questionnaire was completed by 280 representatives of social economy organisations from the development regions of Northeast, Southeast and Bucharest-Ilfov, identified both in the databases with organisations from previous RIQL research on social economy, and through the network sampling technique. These selection methods do not guarantee representativeness, but the information allows us to examine the relationship between different types of organisations and the studied aspects.

Perceptions relative to the development of social economy were also captured in the qualitative research component, especially in the interviews held with (22) key informants from the sectors of social economy, community development, social policies and Roma minority issues, from the same development regions as those targeted by quantitative research. Social sector informants came from non-governmental organisations (10 people), academia (seven people), consulting (three people), central public administration (one person) and cooperatives (one person),

having been involved in social economy projects as facilitators (legal, economic, business development), consultants, researchers, trainers, or social enterprise managers. Interviews dealt with topics like the definition of the social economy concept, the state of sector development at national level, sectoral impact of grants, especially ESF, relationship between social economy and vulnerable groups, or the legal framework. Interview analysis comes to complement the information obtained during the questionnaire-based survey, contributing to a more comprehensive picture of the way in which social economy is understood.

The research was carried out after five years of social economy project implementation with ESF funds and, unlike previous studies, this article seeks to analyse the perceptions of social economy development based on the assumption that the concept was already known at the time of research.

FAMILIARITY WITH ‘SOCIAL ECONOMY’ TERM

The representatives of the organisations included in the quantitative research related to the popularity of the social economy term in Romania assess that the term is little or not at all known to the population (according to 56% of respondents, the public knows the term to a little extent or does not know it at all), but the academia, the authorities or the organisations directly involved in relevant activities are more familiar with the term (*Table 1*). The greatest familiarity with the concept is attributed to non-governmental organisations, which may be explained, on the one hand, by a greater NGO visibility in social economy debates and the higher number of projects implemented by NGOs in this field and, on the other hand, by the high share of NGOs among the organisations included in the quantitative research (approximately 68%).

Table 1

Do you think that, in Romania, the ‘social economy’ term is known to ...? (%)

	To a little extent/ Not at all	To a moderate extent	To a very great extent	DNK	NR
Central authorities	22%	43%	29%	5%	1%
Local authorities	26%	39%	30%	4%	1%
Non-governmental organisations	10%	35%	50%	4%	1%
Academia	18%	30%	39%	11%	2%
Business environment	26%	40%	23%	9%	2%
Mutual aid associations	23%	34%	26%	15%	2%
Cooperatives	24%	39%	21%	13%	3%
Population	56%	26%	11%	5%	2%

Source: Inclusive-Active-Efficient database (N = 280).

The uncertainty or confusion surrounding the social economy term, identified during quantitative research, was also confirmed by qualitative research findings, as the interviews with social sector informants highlighted the lack of a clear vision for the sector and its rather circumstantial and fragmented development. The accelerated development of social economy, correlated with the lack of organic growth adapted to the national context, is one of the effects impacting the sector that some respondents attributed to grants.

“I believe that, in Romania, we talk about social economy without having a clear picture of what social economy is all about. There are, of course, different types of enterprises which qualify as social economy [entities], but from the perspective of a coherent sector that sort of gets the attention of the authorities and is sort of regulated, sort of viably connected to the other sectors, I don't think we can say that Romania has a social economy sector” (Key informant, social sector, NGO, Bucharest).

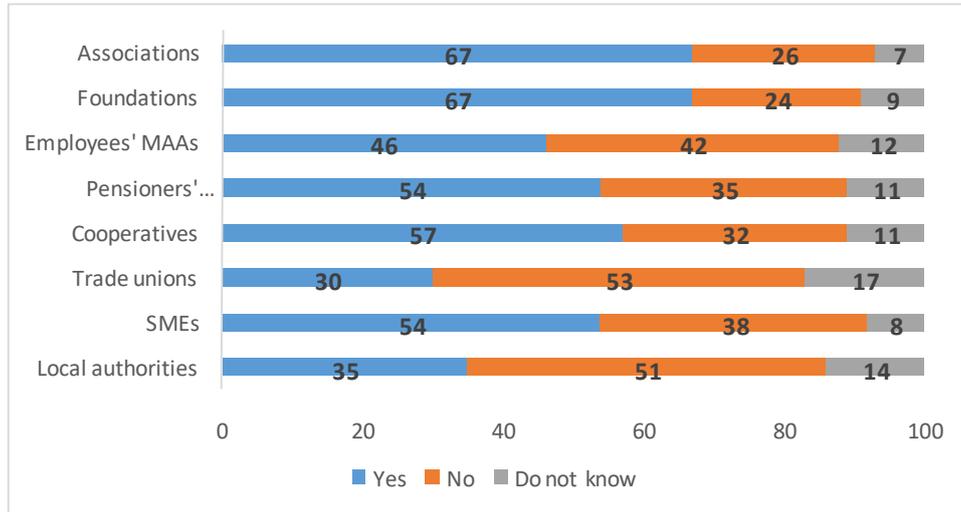
The interviewed informants seem to be in agreement not only about the fact that, at the time of interviews, social economy was in the early stages of development and even definition, but also about the major contribution of grant-funded projects to sector development. However, some of them are aware of the fact that the greater popularity of and interest in social economy generated by grant-funded projects has also come with a limitation of its meaning to the social inclusion of vulnerable groups.

“I think that, on the one hand, the concept of social economy has gained popularity and, on the other hand, it is being interpreted in a limited manner as a way to direct social benefits toward disadvantaged groups” (Key informant, social economy, academia, Iași).

When moving from the general, that is the definition of social economy, to the specific, namely fitting certain types of organisations into the social economy sector, respondents' previous assessment related to the familiarity with and understanding of the social economy term is confirmed. Hence, over 70% of quantitative research respondents believe that the work of social economy organisations is not sufficiently known. The proportion of those who catalogue associations, foundations, cooperatives, employees' and pensioners' mutual aid associations as being part of social economy is high, but the share of negative responses for each of these organisations is not to be ignored, for it varies between 24% and 42%. Also, a great number of respondents classify trade unions (30%) and local authorities (35%) as social economy organisations. The large number of 'do not know' answers for each of the organisations mentioned is yet another indicator of uncertainty regarding social economy and the organisations that fit into this sector.

Figure 1

Which ones of the following organisations would you include in the social economy sector?



Source: Inclusive-Active-Efficient database.

The interviews with social sector informants also point out a relatively small familiarity with the social economy concept. While respondents with less expertise tackle the topic mostly by relating to the organisations they know (for instance, worker cooperatives), those who are more familiar with social economy (informants from the academic environment, consultants) show a broader perspective of the sector and engage in topics like the decline of cooperatives compared with the communist period and the development of new entities that can fit into the social economy sector: associations and foundations. Both research components reveal that associations, foundations, cooperatives, and mutual aid associations are the ones that are most frequently defined as social economy organisations.

Given the emphasis that the public discourse and, hence, recent grant instruments place on the role of social economy in addressing social exclusion through job creation and employment growth, it is not surprising that many questionnaire respondents (72%) ranked “job creators” second among the phrases that best describe social economy organisations. With values that are more than twice as high as the initial target (11,369 jobs created by the end of 2015 against a target of 5,000), the indicator related to the number of jobs created by social economy structures testifies to the success of SOP HRD (AMPOSDRU, 2017: 144). The excessive attention donors (especially ESF) pay to the number of generated jobs indicate the absence of a long-term vision and failure to consider the sustainability of social enterprises and the jobs they create. This trend is exacerbated by the lack

of coordination and correlation between the lines of funding and beneficiaries' real needs, the outcomes of previous programmes, and realistic employment objectives.

“When such problems are handled through calls for proposals that no one coordinates at all, we have a very serious anomaly, (...) For instance, in the beginning, there was a line of funding in which everybody developed good practice guidelines or planned visits abroad and so on; now there is a line of funding in which everyone has to measure the indicator called ‘employment of persons with disabilities’ and it is asked that ... in the last year’s application, huge numbers were required; for funding worth a few million you had to get hundreds of jobs.... Impossible! I mean you were out of place with the first requirement, where you weren’t interested in jobs; you’re even more out of place with the second requirement, where the number of jobs is totally unrealistic” (Key informant, social sector, NGO, Bucharest).

The fact that over three quarters of respondents (79%, *Table 2*) defined social economy organisations as being “community-oriented” highlights an awareness of their benefits: providing the services the community needs, addressing social issues, ensuring the social inclusion of disadvantaged people, which are all community development enablers. Moreover, coverage of beneficiaries’ needs and community involvement come first, right after job creation, among the most important aspects for the work of a social economy organisation, according to the respondents (*Table 3*). Community involvement was brought up by many social sector informants that were interviewed during qualitative research and was considered both a major objective for social economy organisations, and a key factor for their success.

“Social economy works when it is tied to the specific needs of a community; you must link social economy to community development” (Key informant, social sector, academia, Bucharest).

During the interviews held with social sector experts, social economy activities developed based on community needs were presented as positive examples and were analysed against those aimed at target groups and needs defined in a theoretical manner in the documentation of certain funding lines, without any connection with the real needs of the communities where they were implemented. On the same note, the interviewed experts draw attention to a side effect of this type of funding, namely actions driven by certain interests to the detriment of those seeking to advance a social purpose and address community needs.

The phrases that, in the eyes of the respondents, best describe social economy organisations include “capable to adapt” and “client-oriented”, whereas at the other end of the spectrum we find terms like “profit-oriented” and “inefficient” (*Table 2*). The answers indicate a positive perception of social economy organisations, since phrases with more negative connotations are considered wrong/inaccurate descriptions.

Given the profile of the respondents and the self-assessment component, caution should be used when analysing these views.

Table 2

Which of the following phrases do you think describe social economy organisations most and least accurately?

	Most accurately	Least accurately	Total (N)
Community-oriented	79%	21%	274
Job creators	72%	28%	269
Capable to adapt	69%	31%	269
Client-oriented	66%	34%	269
Income generators	60%	40%	268
Employee-oriented	56%	44%	269
Substitutes for the services provided by local authorities	55%	45%	271
Independent	53%	49%	267
Grant dependent	48%	52%	265
Profit-oriented	45%	55%	268
Inefficient	27%	73%	269

Source: Inclusive-Active-Efficient database.

Quantitative research subjects also considered the diversification of funding sources, the tax concessions offered by the state or grant consulting when tackling the most important aspects for the work of social economy organisations (Table 3). In a context where the excessive dependence on donors is one of the major problems that NGOs have to face and that was identified as one of the factors slowing down the development of social economy, as well as one of the negative consequences of ESF funding, respondents' financial concerns are only natural (Defourny, 2010; Arpinte, 2012; Varga, 2012; Cace et al. 2013).

Table 3

Which of the following do you think are the most important aspects for the work of social economy organisations?

	Percentage
Job creation	65%
Coverage of beneficiaries' needs	58%
Community involvement	55%
Diversification of funding sources	49%
Tax concessions offered by the state	40%
Grant consulting	34%

* The sum of all percentages is greater than 100% due to multiple-choice options.

Source: Inclusive-Active-Efficient database.

The great attention paid to funding sources is all the more justifiable as first on the 2012 budget structure of the NGOs included in the IAE research (n = 194) came sponsorship (48%) and membership fees (47%), followed by revenue from the 2% of income tax redirected by individuals (28%), whereas applications for EU funds or funding from other donor institutions constituted income sources for 19% and 16%, respectively, of the organisations. Organisational vulnerability is also influenced by the number of funding sources, with 24% of the NGOs included in the research declaring only one source of funding for 2012 and 35% of them, two sources of funding.

The interviewed social sector experts also mention tax concessions and other forms of state support. According to them, the reasons justifying the need for the provision of state support to social economy entities include their lower competitiveness compared to traditional enterprises as well as their social purpose, which does not allow them to make a profit under the same terms as ‘typical’ organisations operating on the market.

With regard to the provision of state support to social economy organisations, qualitative research identified two perspectives among respondents. On the one hand, some subjects think all social economy organisations need to be supported. On the other hand, certain respondents believe that only social economy entities hiring vulnerable people should be supported with specific measures, which they think is justifiable by the productivity deficit of those entities determined by lack of training and skills or certain disabilities as well as by their use of additional human resources (e.g. mentors, psychologists), financial or time resources required when working with people from vulnerable groups.

SOCIAL ECONOMY AND VULNERABLE GROUPS

When discussing the frequent confusion between social economy and the social inclusion of people from vulnerable groups, some of the qualitative research participants questioned the capacity of social economy to solve the problems of the most disadvantaged people. Those who support this point of view mention the lacks of people belonging to vulnerable groups in terms of entrepreneurial skills and competences, which are essential to the survival and development of any business, not just that of a social economy organisation.

“Still, this type of intervention is addressed to people who either have some entrepreneurial skills or they master a craft very well and those people are not the poorest. I mean, wanting to start a social economy enterprise that is self-reliant, sustainable and still in business two years later means that you have to go to people who have certain entrepreneurial skills, who can make a business run. Or, those people are not the most underprivileged ones” (Key informant, social sector, NGO, Bucharest).

Also, some of the interviewed experts question the current definitions of vulnerable group, based on the premise that vulnerability needs to be defined contextually, and that an individual may face multiple vulnerabilities at the same time. Thus, they cast doubt on the ability of interventions aimed at vulnerable groups to address all the vulnerabilities faced by an individual at a given time, and they mention the importance of an integrated approach.

“This is a never-ending story; I don’t think vulnerable groups should be defined anywhere. I think that each local context generates a certain type of vulnerability and our attempt to make things simpler with this classification of vulnerable groups is a bit far-fetched (...) a group or an individual may face seven vulnerabilities, (...) if I eliminate one of them or I address one of the seven vulnerabilities without addressing the other five that affect that unfortunate person, the problem will still be there” (Key informant, social sector, NGO, Bucharest).

OTHER SOCIAL ECONOMY CONTRIBUTIONS

Based on the narrow meaning of social economy, which is quite popular at national level, we could say that the main benefit of sector development is the social inclusion of people from vulnerable groups. Nevertheless, the extended definitions of the term, endorsed by other European states with a longer tradition in the field, point to major benefits in other life areas. Among those, the subjects who completed the IAE research questionnaire mentioned the contribution of social economy to “local economy development” (48%), “community involvement” (45%) or “transforming communities into better places to live” (41%). Also contributing to the attainment of these objectives is “the increase in the number of local projects and programmes”, which respondents ranked first among social economy contributions (52%). During quantitative research, “social capital development” came first in respondents’ ranking of social economy contributions (14%), which may be explained by respondents’ poor understanding of social capital.

Although the discussions related to social economy inevitably touch upon the issue of job creation, respondents don’t place “raising skill levels” among the most important social economy contributions, as this comes second to last and gathers almost the same number of responses as “the development of national economy” (approximately 29%).

For the informants interviewed during qualitative research, the role of social economy seems to be more visible in relation to rural areas, particularly through community investment and job creation. Respondents also stress the contribution of social economy organisations to the preservation and valorisation

of traditions and, ultimately, their potential for developing local tourism and attracting investors.

CONCLUSIONS

Despite numerous studies on social economy, social enterprises or different entities considered to be part of this sector, meant to define the concept and present its national development, the representatives of non-governmental organisations, cooperatives, mutual aid associations, academia, decision makers or other social sector professionals (e.g. consultants) are still dealing with conceptual confusion. Although many respondents are aware of the role of social economy for local development and its impact on community involvement, social capital development or improvements in the quality of life at community level, these aspects have not been sufficiently promoted under recent lines of funding, especially large-scale ones, being preponderantly targeted by small-size competitions. Consequently, the spotlight has been taken by the rhetoric on the role played by social economy in reaching the objectives aimed at the social inclusion of people from vulnerable groups, as promoted by the biggest funder of social economy in Romania – SOP HRD. This has resulted in a more narrow meaning of the term and in underestimating the role of social economy. The approach to social economy as a form of social inclusion has been quite strong, for it developed in Romania during a time of economic crisis (2009–2011), when there was a much greater need to identify new employment opportunities.

Moreover, the analysis confirms at national level the same model identified in other states where this sector has developed mostly thanks to European funding, and where the concept is understood only in terms of the benefits it brings to the social inclusion of vulnerable groups. The research has confirmed the hypothesis of the article that the representatives of these entities and decision makers are still confused about the definition and use of the social economy term, despite the numerous studies conducted in Romania between 2008 and 2013.

At the end of a five-year period in which social economy benefited from funding in Romania, this research intends to present the way the representatives of social economy structures and relevant professionals see the concept. Understanding the limitations of the concept is the starting point for developing a new approach to extend the scope of social economy. This is a process involving broader conceptual development and debates with the representatives of these social economy entities. The article presents the understanding of the social economy term, while drawing attention to the consequences of a limited definition of the sector.

This conceptual confusion can produce undesirable effects both in the allocation of resources for the development of these entities and at the level of

public policies. A relevant example is the public policymaking process in the field of social economy, which needed more than three years to define the concept and the organisations that could qualify as social economy entities. Since social economy has been reduced to an active form of social inclusion through job opportunities offered to people from vulnerable groups, the Social Economy Law sets incentives only for WISEs, which will have a negative impact on the other social enterprises and, hence, on sector development in Romania. With the concept being restricted to the integration of vulnerable people, some of the more traditional social economy organisations (like worker cooperatives) don't want to be included in this sector because this would make their access to certain markets more difficult. On the other hand, given that incentives are only provided to WISEs, the other social enterprises have to extensively develop their entrepreneurial dimension to the detriment of the social factor. At the same time, community development has to suffer, as social enterprises favour the use of local resources. The diversity of areas where social enterprises could flourish is one of the key benefits and the principles guiding the social economy concept contribute to the development of a new business vision, where the social or environmental factor is just as important as the economic factor, with benefits not only for entrepreneurs, but also for the community.

SOP HRD implementation reports highlight the success of the programme in terms of jobs generated by the newly created or developed social economy structures. Since the definition of social economy is limited to the inclusion of vulnerable groups, one of the biggest problems facing the social enterprises founded under SOP HRD with ESF support is lack of people with the skills required for making certain goods or delivering competitive services on the market. Therefore, the greatest challenge they will have to deal with in the long run is the sustainability of the jobs created over the funding period. The interviewed key informants are in agreement when it comes to the future and community impact of social enterprises, especially of those set up through projects funded under SOP HRD. Respondents' main concerns regard the non-sustainability of enterprises given their dependence on external funds and inability to make visible changes in the communities concerned. In order to get more detailed information about the impact of the limited understanding of the social economy concept, it would be useful to scale up research to a national level. At the same time, analyses need to be made regarding the impact of social economy on the business environment, the NGO sector and the opening of the social service market. Starting from institutional theories, comparative studies between European countries are needed to look at the impact of different measures and policy approaches on the development of social economy, as well as to analyse the sustainability of social enterprises.

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Intensificarea finanțării pentru dezvoltarea economiei sociale a contribuit la creșterea numărului de cercetări, publicații și dezbateri privind rolul acesteia și la popularizarea termenului. Principalele surse de finanțare au avut o contribuție importantă la modul în care economia socială este înțeleasă și la dezvoltarea acestui sector în România. Pornind de la teoriile instituționaliste conform cărora dezvoltarea economiei sociale și modul de organizare și funcționare a entităților acesteia depinde de contextul economic, social, instituțional în care acestea își derulează activitatea (Kerlin, 2017; Rueshemeyer, 2009; Teasdale, 2012; Sepulveda, 2015), articolul de față analizează dezvoltarea sectorului economiei sociale în România. Întrebarea de cercetare la care articolul încearcă să ofere răspuns vizează relația existentă între modul de deținere a economiei sociale și întreprinderii sociale și dezvoltarea ulterioară a acestor entități în România. În ciuda demersurilor intense de deținere a economiei sociale și legiferare a sectorului din ultimii ani, rezultatele cercetării analizate în lucrare indică o lipsă de consistență, încă prezentă la nivel național, în ceea ce privește înțelegerea economiei sociale și a întreprinderilor sociale. Limitarea sectorului economiei sociale în special la rolul lui în incluziunea socială a determinat o dezvoltare a lui în special în acest domeniu. Având la bază o analiză secundară a datelor culese în 2013 printr-un mix de metode calitative și cantitative, articolul prezintă o analiză a gradului de cunoaștere a termenului, caracteristicilor definiției ale întreprinderilor sociale și principalelor contribuții ale acestora și atrage, în același timp, atenția asupra tendinței de subestimare a rolului economiei sociale.

Cuvinte-cheie: economie socială; întreprinderi sociale; incluziune socială; grupuri vulnerabile.

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