



Blueprint for advanced skills & trainings in the social economy

OPPORTUNITIES AND CHALLENGES FOR THE SOCIAL ECONOMY



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Organisation	Université de Liège (BE)
Authors	Florence Lanzi, Helena Sadzot, Charlotte Moreau
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This document is an extract of a complete research developed under the baSE project to identify competences and advanced trainings schemes adaptable to diverse SEE in Europe.

The complete version of the Synthesis Report can be found on www.socialeconomyskills.eu/resources



Acronyms

baSE	Blueprint for advanced competences and trainings in the Social Economy
EC	European Commission
EU	European Union
NPO	Non Profit Organisation
SE	Social Economy
SEO(s)	Social Economy Organisation(s)

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1. Introduction

The urge to transition towards a sustainable economy that is non-threatening to the planet, more inclusive for all and fit for the digital age has been widely acknowledged (Kwauk & Casey, 2022; OECD, 2023; Social Economy & Proximity Competences Alliance, 2023; Social Good Accelerator et al., 2022) few countries are considering education policy that can facilitate the development of green skills for such transitions. Where policy discussions are happening, green skills are often conflated with science, technology, engineering, and maths (STEM).

To tackle these challenges, novel approaches and new business models are necessary (European Commission, 2021a). The European Union is conscious of these challenges. Since 2017, the European Commission (hereafter EC) has released its Green Deal, its Digital Strategy as well as the Social Rights Action Plan (European Commission, 2018, 2020a, 2020b, 2023) aiming to move toward a more sustainable life for all.

As social economy organisations (hereafter SEOs) are, by definition, driven by a social mission¹, they hold great potential to establish alternative, non-threatening and sustainable business models that address today's challenges. Indeed, thanks to the specific features that lie at the heart of the social economy (such as the primacy of the social aim, the limitation of profit distribution, as well as their local anchorage and their democratic and participatory mechanisms), SEOs often contribute to the emergence of innovative solutions to the supply of sustainable goods and services, or, among other issues, to bridging the employment and digital gaps for those far from the market and technologies. For these reasons, it is imperative to **support the creation of SEOs** and their development.

Yet, as for other industrial ecosystems, the social economy (hereafter SE) is currently facing difficulties, including the **need to reskill and upskill** the workforce to address green and digital competence shortages while preventing the exclusion of workers. Indeed, we see an increase in the number of SEOs driven by an environmental purpose, which automatically raises the demand for workers with green as well as other SE competences. At the same time, reskilling and upskilling efforts are also needed to facilitate workers' reallocation from declining activities to expanding ones. In addition, over the past decade, a set of ground-breaking, emerging technologies have signalled the start of the Fourth Industrial Revolution that is massively disrupting competence needs across a broad range of industries, and the SE is not exempt. *"New data from the Future of Jobs Survey suggests that on average 15% of a company's workforce is at risk of disruption in the horizon up to 2025, and on average 6% of workers are expected to be fully displaced."* (World Economic Forum, 2020, p. 8).

Therefore, to support the SE sector, which holds great potential in the face of the current grand challenges, it is necessary to **strengthen future and current SE workers** through the design and supply of adapted curricula. *"Developing and enhancing human competences and capabilities through education, learning and meaningful work are key drivers of economic success, of individual well-being and societal cohesion."* (World

¹ What is usually called the "social mission" can encompass contributing to the well-being of people or communities as well as benefiting the environment or various elements of a social system.

Economic Forum, 2020, p. 8). For this reason, and in conjunction with the EC Pact for Skills strategy², the baSE project aims to reinforce the capacities of the SE and its human capital in key areas such as the digital and green transitions and inclusiveness.

To reach this goal, the **baSE project** involves 25 partners (SE federations, umbrella organisations and support structures, higher education and vocational education and training (VET) providers, research institutions and sector experts) from 10 European countries (Belgium, France, Germany, Greece, Ireland, Italy, Poland, Romania, Slovenia and Spain) forming an alliance for sectoral cooperation on competences for the social economy and proximity ecosystem. More precisely, the baSE project focuses on competence mismatches for the upskilling and reskilling of SE practitioners, managers and supporters, by contributing to developing a new strategic approach (Blueprint) for sectoral cooperation on the supply of skills for new or updated occupational profiles in the SE sector.

The present report synthesises the extended research conducted in each of the 10 countries involved in the project, in order to understand, at European level, the needs of SEOs in terms of reskilling and upskilling to effectively face the green and digital transitions as well as the inclusiveness challenge.

This report starts with a description and definition of the SE (section 2). It then presents a mapping of the SE in the EU, starting with a historical perspective. The mapping continues with an explanation of the differences in policy frameworks between EU countries, and finally gives a statistical overview of the importance of the SE in the baSE partner countries (section 3). We then explore the opportunities and challenges for the SE in the future, specifically explaining how the SE constitutes a suitable path toward a fair and inclusive twin transition (section 4). This theoretical content sets the stage for the empirical assessment of SE competence needs in the 10 baSE partner countries (section 5). The methodology is detailed before presenting the overview of the results. Following the analysis of the aggregated results, overarching recommendations are provided. Subsequently, the national syntheses are presented.

² <https://ec.europa.eu/social/main.jsp?catId=1517&langId=en>

2. What is the social economy?

The SE ecosystem comprises a **wide range of organisations** that adopt diverse legal forms (cooperatives, non-profit and not-for-profit organisations, mutual funds, foundations, associations, social enterprises, etc.) and that operate in various sectors of activity (agri-food, care, energy, construction, textiles, home services, retail, finance, etc.). The commonality between SEOs – in other words, what defines the SE ecosystem – resides in specific features or practices that differentiate them from other conventional (or ‘capitalist’, see below) private enterprises or public organisations.

Neither academics nor practitioners agree on a single definition of the SE. In the context of this work, we define the SE, as suggested by the **Social Economy Action Plan**³, through three criteria that SEOs share (cf. figure 1):

- The primacy of people as well as social and/or environmental purpose over profit;
- The reinvestment of most of the profits and surpluses to carry out activities in the interest of members/users (“collective interest”) or society at large (“general interest”);
- Democratic and/or participatory governance.

This figure below presents these three social economy criteria. They are explained in detail under the figure.

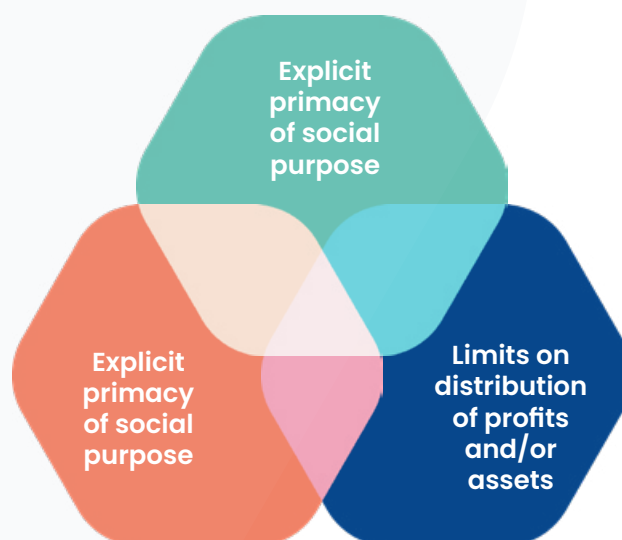


Figure 1 - Social Economy Criteria. European Commission, Directorate General for Employment, Social Affairs and Inclusion, Directorate C Unit C2), A map of social enterprises and their eco-systems in Europe, 2016. P.VI

³ The Social Economy Action Plan (SEAP) aims to mobilise the full potential of the SE, on the horizon of 2030. For more information, visit https://social-economy-gateway.ec.europa.eu/eu-initiatives/seap_en

First, SEOs are primarily driven by social purpose rather than financial maximisation or investor enrichment. The social purpose can serve the mutual but non-capitalist interest of the organisation's members or beneficiaries (such as providing health insurance, food, jobs etc. to members), and/or it can serve the general interest of society at large (such as protecting the environment, reducing poverty etc.).

Then, if profits are made (as they are not forbidden), for the most part they will be reinvested to support the social purpose rather than capitalist enrichment. And if a SEO chooses to distribute surpluses, this is strictly limited as people and social purpose remain the priority.

Finally, SEOs are also characterised by democratic and/or participatory governance. In capitalist organisations, investors are dividend recipients as well as decision-makers, and their decision-making power is proportionally linked to their capital contribution. In SEOs, whatever the number and the variety of stakeholders, decision-making power is not proportional to the capital contribution, and generally follows the principle of "one person one vote". Moreover, to gain stakeholders' participation, SEO governance usually goes beyond statutory requirements (Defourny & Nyssens, 2017; Petrella, 2017). Thereby, in addition to the formal governance bodies (i.e. general assembly and board of directors), other participatory mechanisms (committees, working groups, ad hoc governance bodies etc.) are usually implemented (Labie, 2005; La-ville & Mahiou, 1985).

3. Mapping the social economy

This section offers an extended yet not exhaustive overview of the emergence and evolution of the SE across the European Union. We start by outlining the origins of the SE, then examine its legal recognition in different member states, encompassing the variations in both legal framework and timing of appearance. Lastly, we assess the current state of development of the SE in the 10 countries involved in the baSE project.

3.1 Historical perspective

The modern SE movement was born in Europe in parallel with the industrial revolution (The Editors of Encyclopaedia Britannica, 2023), although its origins can be traced to the Middle Ages when the first charities, guilds and craftspeople's associations were created.

Most researchers identify the **Rochdale Society of Equitable Pioneers** as the first modern cooperative. This cooperative was founded in 1844, in Rochdale, near Manchester, by a group of 28 artisans working in the cotton mills, with the purpose of buying together 'honest food, at an honest price'. The cooperative was guided by the Rochdale principles of voluntary and open membership, democratic member control, member economic participation, autonomy and independence, education, training and information, cooperation among cooperatives, as well as concern for the community (Fairbairn, 1994).

After the Rochdale Society of Equitable Pioneers, these principles persisted, inspiring the cooperative movement worldwide, and eventually a revisited version was instituted by the **International Cooperative Association** (ICA). Beyond cooperatives, the Rochdale principles influenced the whole SE's identity, since, in many European countries at that time, the SE was rooted in the history of the cooperative movement.

Examples of SEOs during the industrial period in Europe are numerous. We know of cooperatives in the financial sector established in Ljubljana, Slovenia in 1856. Countries such as France, Italy, Belgium (and probably others) were home to a large number of worker cooperatives defending workers' rights and promoting economic democracy. Different forms of association were also emerging, sometimes initiated by religious institutions (often the Catholic church) to answer poverty and social challenges. This trend was particularly strong in Ireland, Italy and Belgium. It is also during the industrial period that the first mutual funds were created to ensure a solidarity-based access to insurance and social protection by workers and their families (Monzón Campos & Chaves Ávila, 2013). During the 19th and 20th centuries, the main SE entities (cooperatives, mutual funds, associations, charities and foundations) significantly expanded across Europe and other regions of the world, becoming key actors of Europe's socio-economic landscape (Monzón Campos & Chaves Ávila, 2013).

The second half of the 20th century played a decisive role in catalysing the various experiences of associationism and cooperation, both religious ones and those with a secular imprint. Indeed, each of these forms progressively saw the **emergence of various legal frameworks** allowing their recognition. For instance, in France, the Waldeck-Rousseau law of 1 July 1901 instituted associations while cooperatives were instituted by law in 1947. In Belgium, cooperatives have been legally authorised since 1873 and the Law on Associa-

tions was promulgated in 1921, governing both associations and foundations (Defourny, 2017).

In some countries, SE development was severely affected by **communism**. In Poland, after a strong cooperative development during the interwar period, cooperatives were abolished in the territories occupied by the Third Reich (Frączak & Wygnański, 2006). Similarly, in Romania, associations and foundations ceased their activity during the communist period (Petrescu et al., 2021; Petrescu & Lambru, 2019a). After the fall of communism came a resurgence of SE entities except maybe for cooperatives. Their previous politicisation and their often-difficult financial situation led to negative connotations that sometimes persist to this day in the popular perception (Frączak & Wygnański, 2006). Later, their accession to the EU (in 2004 for Poland and 2007 for Romania) strongly influenced SE development in these territories. The funding opportunities and the EU agenda enabled research and programmes that helped increase SE visibility as well as the creation of legal frameworks.

3.2 Policy framework across the EU

At the European level, SEOs, and particularly cooperatives, have been recognised since the founding of the European Economic Community in 1957 with the signing of the Treaty of Rome. Article 58 of the treaty states: “*Companies are defined as companies under civil or commercial law, including cooperative societies, and other legal persons under public or private law, with the exception of non-profit companies*”. Nowadays, differences remain between countries regarding the legal framework available to SE and to SEOs.

However, it was not until the 2000s that **the term SE** – in reference to the whole ecosystem it encompassed – would be integrated **in national laws**. This is, at least partly, the result of an increase in the number of SEOs as well as various actions taken at the EU level, for instance the launch, in 1989, of the European Commission’s first communication devoted to the SE (Macías Ruano & Manso, 2019), the regulation of the European Cooperative Society in 2003 (Filippi & Hiez, 2022) and the European Commission communication on the Social Business Initiative (2011). The last historic turning-point happened in 2022, at the 110th Conference of the International Labour Organisation, where a universal definition of the SE was adopted. Filippi & Hiez (2022) state that the “SE is emerging from the margins of the capitalist model to assert itself as a relevant alternative to meet the challenges of transition”.

In addition to the separate laws existing on associations, cooperatives, mutual funds, and other SE entities, several countries adopted an additional law defining and establishing the **SE ecosystem** and/or concerning social entrepreneurship: the Spanish Social Economy Law (2011), the Slovenian Act on Social Entrepreneurship (2011), the Dutch Law on Social Enterprises (2012), the Portuguese National Law on the Social Economy (2013), the French National Law on the Social and Solidarity Economy (2014), the Romanian Law on the Social Economy (2015), the Lithuanian Order on the Concept of Social Entrepreneurship (2015), the Luxembourg law on Societal Impact Societies (2016), the Greek Law on the Social and Solidarity Economy (2016), the Italian Code of the Third Sector (2017), and the recent Polish Act on the Social Economy (2022).

Currently, and despite the recent evolution at national level and EU influence, the member states’ legal frameworks remain very unequal across the EU (European Commission. Directorate General for Employment, Social Affairs and Inclusion, 2020; Macías Ruano & Manso, 2019). Some European countries (e.g.

Germany, Ireland) have no legal definition of the SE (as an ecosystem) nor of social enterprises. Also, when definitions exist, the defining criteria vary significantly across countries. The extended comparative study financed by the EC on social enterprises and their ecosystems in Europe confirms this diversity (European Commission, Directorate General for Employment, Social Affairs and Inclusion, 2020). However, as Macías Ruano & Manso (2019) explain, this lack of uniformity disadvantages European SEOs, as they do not form a whole that could influence the institutions of the EU. In addition, if a specific SEO legal form lacks recognition in another country where an organisation intends to compete, this lack of recognition prevents it from competing on equal terms, particularly in the context of public sector tendering processes.

Most of the time, countries have **legal frameworks regarding each entity** that composes the SE, that is: cooperatives, associations, foundations, etc. Those frameworks can exist even if the country has not legally defined the SE as a whole. In addition, some states have established certifications or accreditations related to certain entities or areas of activities. For instance, most countries have adopted specific legislation regarding work integration social enterprises (WISEs) with distinct certifications. In Germany, the Renewable Energies Law forms the legal basis for a distinctive type of SEO, namely the citizen-owned energy cooperative. This has helped with their successful expansion, particularly in the mid-2000s. In Spain, an explicit law exists for worker-owned enterprises (Sociedades anónimas laborales – SALes).

On top of this, some countries have established a SE recognition through additional mandatory or voluntary **certifications or accreditations**. For instance, in Romania, Italy and Belgium (at regional level), social enterprise certification can be voluntarily obtained by any private legal person that satisfies the associated principles. In contrast, SE accreditation in Greece is not only granted through the satisfaction of a number of SE principles, but can also depend on the field of activity or the organisation's aim (e.g. inclusion of vulnerable groups, collectives of employees, etc.). In Ireland, the certification concerns charities only and in Italy, SEOs are named “third sector” organisations.

Overall, European countries can learn from each other within this rich diversity. However, it makes cross-country comparisons a lot harder.

3.3 Statistical evaluation of the SE across the EU

3.3.1 Caution: uneven statistical calculation

Few countries within the baSE project's consortium are able to produce reliable statistics regarding their entire SE ecosystem. The diversity in legal forms and activities renders statistical calculation quite challenging. Indeed, since SE or social enterprise certification – when it exists – is often quite recent, and usually non-mandatory, many SEOs are not included in the associated databases. Therefore, to obtain relevant statistics one is often obliged to aggregate available statistics on the legal entities that compose the SE, namely cooperatives, associations, foundations and mutual funds, as well as data on other relevant legal statuses available to member states.

This method runs the risk of including organisations that do not satisfy some SE principles (such as democratic organisation, which is often difficult to verify). It may also omit some SEOs because they have not re-

requested the specific SE status or because they were not even conscious of being part of the SE ecosystem.

For instance, Romania has a social enterprises label that should help evaluate the importance of its SE ecosystem. However, it estimates that only 0.9% of SEOs are certified social enterprises (Petrescu et al., 2021; Vamesu, 2022). The same situation prevails in Slovenia, where the registered social enterprises employ 0.45% of the active Slovenian population while the estimated effective SE employs a higher share of the working population – 2.68% – with revenues equivalent to 2.69% of GDP. This picture includes companies for persons with disabilities, which employ 1.37% of the active population and could also be considered as SEOs (European Commission, 2019). In contrast, in Greece, according to the General Register held by the Directorate of Social and Solidarity Economy,⁴ the number of registered SEOs is 2,281. Yet, 438 are either named as “inactive”, “temporarily deleted”, or “permanently deleted”.

Thanks to their SE observatories, France and Belgium produce more accurate data on the SE. In this respect, the European Commission has recently published a call for tenders aiming at “Improving the Socio-economic Knowledge of the Proximity and SE ecosystem”.⁵

3.3.2 Statistical overview of the SE in the EU and across the baSE consortium

Currently, according to the latest available EU data (2016), the SE accounts for 2.8 million entities (mostly cooperatives, mutual funds, associations, foundations and social enterprises), employing 13.6 million people (i.e. 6.3% of the EU’s working population), and mobilising more than 82.8 million volunteers. According to the same source, there are 232 million members of cooperatives, mutual funds, and similar entities (European Commission, 2016).

In terms of geographical distribution, the SE is very heterogeneously developed in the EU, where it represents between 0.6% and 10% of all jobs across the member states (European Economic and Social Committee & CIRIEC International, 2017). According to the available estimates, the SE plays a major role in France, Spain, Italy and Belgium, where it represents more than 10% of jobs and approximately 10% of GDP (European Economic and Social Committee & CIRIEC International, 2017). The significant variation in SE development across member states suggests an untapped economic potential, including in terms of job creation, in many member states where the SE is less advanced.

To help give a better understanding of the uneven development of the SE across the EU, we asked partners from the 10 countries involved in the baSE consortium to provide data regarding the importance of the SE in their country.

As explained before, definitions of the SE are not homogeneous and statistical computation varies widely across countries. For this reason, the tables presented below should be considered with caution. Nonetheless, they offer interesting data to initiate comparisons among European Union countries.

⁴ <https://kalo.gov.gr/>

⁵ <https://etendering.ted.europa.eu/document/document-file-download.html?docFileId=146452>

Table 1 – The share of SE across countries involved in baSE project

The share of SE across countries involved in baSE project ⁶		
Country	Share of SE in terms of employment (% of total employment, year)	
GREECE	0.17	(2018)
ROMANIA	1.86	(2021)
POLAND	2.7	(2016)
SLOVENIA	3.2	(2022)
IRELAND	6.58	(2021)
FRANCE	10.2	(2019)
GERMANY	11	(2012)
BELGIUM	12.5	(2020)
SPAIN	12.5	(2018)
ITALY	12.6	(2015)

Table 2 – The share of SE across countries involved in baSE project

The share of SE across countries involved in baSE project ⁷		
Country	Share of SE in number of organisations (% of total number of organisations)	
GREECE	0.028	(2018)
POLAND	5	(2016)
SPAIN	6.1	(2018)
BELGIUM	7.52	(2021)
ITALY	8.1	(2015)
FRANCE	8.3	(2019)
IRELAND	9.7	(2021)
GERMANY	10	(2016)
SLOVENIA	11.5	(2022)
ROMANIA	19.61	(2021)

Table 1 reveals that in half of the countries studied (*Italy, Spain, Belgium, Germany and France*), over 10% of the workforce is employed in SEOs. Among these, *Italy, Spain and Belgium* exhibit the highest rates, with approximatively 12.5% of their workforce involved in the SE. Ireland stands in the middle, with 6,58% of the workforce employed in SEOs. *Slovenia, Romania and Poland* reach on average 2,59% of their workforce in the SE, while *Greece* lags behind with only 0.17% of its workforce active in SEOs.

⁶ Computation methods are described in appendix 1 of each country national report.

⁷ Computation methods are described in appendix 1 of each country national report.

When considering the number of organisations (as indicated in table 2), *Romania* takes the lead with 19.61% of all registered organisations being part of the SE. It is noteworthy that this statistic is quite surprising when considering the relatively low percentage of the workforce engaged in social enterprises (SEs) in *Romania*, which stands at 1.86%. It can be explained because many SEOs in *Romania* are very small, with 0 to 3 employees. A similar trend can be observed in *Slovenia*, where 11.5% of organisations are actively involved in the SE, but the portion of the workforce participating in SEs remains surprisingly low at 3.2%.

Next to *Romania* and *Slovenia* come *Germany* and *Ireland* with approximately 10% of all registered organisations being considered part of the SE. Another group of countries, including *Belgium*, *France* and *Italy*, show a representation level of around 8%. *Poland* and *Spain* fall in the range of approximately 5.5% of their total organisations being SEOs. *Greece* has the lowest rate, with a mere 0.028% of its organisations considered as part of the social economy. However, this number has to be taken cautiously: it is the only data we were able to find, but we believe the reality is different, and that more SEOs exist in *Greece*.

This disparity between the proportion of organisations and the level of employment in the SE can be attributed to the fact that many non-profit organisations (which in every country examined represent more than half of the organisations, see table 2 below) do not have paid employees. Nevertheless, they still deliver valuable services with the assistance of volunteers. This underscores the importance of examining both sets of statistics – the number of organisations and the employment figures.

Table 3- Diversity of organisational forms in the social economy per country

Diversity of organisational forms in the social economy by country							
Country	% of Cooperatives	% of Non-profits	% of Foundations	% of Mutual funds	% of Social Enterprises	% of Others	(Year)
BELGIUM	3.6	91.2	1.3	0.5	3.5	/	2021
FRANCE	5.4	93.8	0.4	0.4	< 1	/	2019
GERMANY	1.12	95	4	Counted in "others"	Counted in "others"	1	2018
GREECE	1.7	No data	No data	No data	97.6	0.7	2018
IRELAND	1.44	95.68	/	/	/	/	2022
ITALY	9.78	76.98	1.73	Counted in "others"	4.33	7.18	2015
POLAND	1.5	78.75	14.6	Not considered as part of SE ecosystem	Not a legal form	5.15	2017
ROMANIA	1.1	85	9.8	2.9	1.3	/	2021
SLOVENIA	1.5	84.7	0.8	Not considered as part of SE ecosystem	Not a legal form	12	2017
SPAIN	32.8	53.2	Counted in non-profits	0.4	13.6	/	2018

In the countries sampled, non-profit organisations emerge as the dominant organisational form within the SE. This is especially evident in Ireland, *Germany*, *France* and *Belgium*, where non-profit associations constitute over 90% of all SEOs. However it is important to highlight that in Spain the proportion of non-profit organisations is notably lower, standing at 53.2%. Unfortunately, complete data for *Greece* are unavailable.

When considering cooperatives, *Spain* stands out with a substantial presence of cooperatives at 32.8% in its SE ecosystem. In contrast, in the other countries included in the sample, cooperatives have a less significant presence, with representation falling below 10% in *Italy*, *France* and *Belgium*. Furthermore, cooperatives account for less than 2% in *Romania*, *Greece*, *Slovenia*, *Poland*, *Germany* and Ireland. However cooperatives are usually less numerous, but their employment rate is often higher than in other countries. For instance in *Romania* associations and foundations represent the vast majority of the SE ecosystem but cooperatives employ around a quarter of SE workers (Vamesu. 2022).

Regarding foundations, describing the sample is more complex because in some countries foundations are categorised within non-profit associations. Nevertheless, when considered separately, foundations typically constitute less than 2% of SEs. *Poland* and *Germany* stand as exceptions to this trend, with foundations representing 14.6% and 4% of SEs respectively.

Table 4 – Primary sectors in SE per country

Primary sectors in SE per country					
Country	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5
BELGIUM	Social work	Arts, entertainment and recreation	Health	Non-compulsory education	Administrative and support services activities
FRANCE	Social work	Education	Financial activities and insurance	Health	Administrative and support services activities (with also some recreation and education activities)
GERMANY	Sport	Culture	Education	Leisure	Social services
GREECE	Education	Retail	Wholesale trade	Organisational activities	Catering
IRELAND	Local development, housing	Recreation, sports	Education, research	Religion	Social services
ITALY	Cultural, artistic, sporting, socialisation and entertainment activities	Social assistance, civil protection, health and care	Protection of rights, advocacy and religion	Education, research and professional activities	Economic development (including manufacturing activities)

POLAND	Culture, communication and recreation activities	Social services, rescue services, employment assistance	Business, professional and labour organisations	Education services and research	Community and economic development, housing activities
ROMANIA	Other service activities	Entertainment, cultural and recreational activities	Health and social work	Financial intermediation and insurance	Education
SLOVENIA	No information available for the whole SE ecosystem but based on legal form. <ul style="list-style-type: none"> • Cooperatives are mostly present in 3 sectors: “Commerce, maintenance and repair of vehicles”, “Agriculture, forestry and fishery”, “professional, scientific and technical activities”. • Social enterprises are mostly active in “Education”, “Information and communication activities”, “Professional, scientific and technical activities”. • NGOs are mainly active in “Education”, “Information and communication activities”, “Health and social care”. 				
SPAIN	Social services	Arts and leisure activities	Education	Agriculture	Energy, water and waste management

In terms of sectorial distribution, as already stated, the SE is present in all economic sectors. However, for the majority of countries covered by the baSE project, the most important sectors are (in different orders) social and health services, education, sport and artistic activities. Two unusual situations are worth noticing. In *Poland*, based on the Polish Classification of Activity, the majority of cooperatives (21.9%) operate in industrial processing or manufacturing (Goś-Wójcickiej, 2022; Social Economy Satellite Account for Poland 2018, 2021). In *Germany*, one in four organisations is developing services for migrants and one in 10 organisations is involved in refugee aid (Priemer et al., 2018).

The above description is based on the number of SEOs in each area of activity. This picture needs to be read with caution as further analysis, conducted in *France* and *Belgium* notably, shows that the best represented sector in number of SEOs involved is not necessary the first in term of workforce. SEOs operating in social and health services or in education tend to have higher employment rates (Observatoire de l’ES, 2022).

This overview reveals that the SE is present in all EU member states, which fall into two categories: countries with a well-established presence of SEOs and those where the SE is gradually expanding.

While the SE exists in every EU member state, there is significant heterogeneity in its legal definitions, where those are present. Moreover, diverse models and practices are observed, reflecting a broad spectrum of diversity, as mentioned earlier. In summary, although a common legislative base has been established within the EU, each country has developed its specific legislation in an uneven manner, resulting in various legal forms. The development of the SE has followed distinct stages influenced by the national and local context, legal frameworks, and political landscapes. Differences also extend to the funding sources used to support the SE ecosystem. However, despite these variations, there is a global acceptance of the values and principles of the SE, such as voluntary association, the priority of people and decent work over capital, democratic governance etc., which serve as the common foundation of SE (Filippi & Hiez, 2022).

But SEOs are **a growing phenomenon with a great potential** that remains somehow underused. In most countries of the baSE project, the number of SEOs and the employment figures are increasing. The general environment is becoming, to some extent, more favourable towards SE development. However, the level of acceptance and recognition varies considerably among EU member states. Countries where the SE is widely and appropriately recognised in public debates, by policy-makers, researchers and practitioners are few.

At the national level, literature reviews conducted by baSE partners (summarised in their national reports) confirm that political recognition of the SE has gained importance over the last decade, whether the SE has a long local tradition or is relatively recent in the landscape. This growing interest has led to the emergence of financial instruments, projects and institutions aimed at promoting SEOs and SE establishment and growth. Partners identified research as a key factor in the institutionalisation and recognition of SE, and they confirm that research and training in the SE are on the rise. Various educational programmes and tools have been introduced to complement the training of field actors and other stakeholders. Despite variations, the overall trend regarding the recognition of the SE is positive.

At the EU level, the European Commission has recognised the potential of the SE, as evidenced by the Social Economy Action Plan. This plan aims to establish favourable conditions for the thriving of SE, open up opportunities, support capacity building, and enhance the recognition of SE and its potential. Additionally, the recent establishment of a universal definition of the SE by the International Labour Organisation marks an important step at the international level (Filippi & Hiez, 2022). Since, this definition has been used by the OECD⁸ in a recommendation on the social and solidarity economy and social innovation, and by the UN General Assembly in a resolution titled *Promoting the social and solidarity economy for sustainable development*.⁹ These diverse initiatives underscore the growing acknowledgment of the importance and the role of the SE.

Although there is still progress to be made toward full and appropriate recognition of the social economy, the overall trend is positive, and the societal shift toward greater social and environmental consciousness supports SE development.

⁸ <https://legalinstruments.oecd.org/en/instruments/OECD-LEGAL-0472>

⁹ <https://unsse.org/wp-content/uploads/2023/04/A-77-L60.pdf>

4. Opportunities and challenges for the SE in the future

4.1 At the core of the SE: the key principle paving the way for a fair and inclusive twin transition

This section explains how the SE's defining principles (described below), and more importantly their combination, provide an encouraging path towards fair and inclusive transitions.

First, SEOs are **primarily driven by a social aim** that is often aligned with societal challenges. Indeed, we find numerous SEOs developing innovative solutions to offer sustainable goods and services to various stakeholders (who sometimes have limited access to those resources), such as local and organic food supply chains, alternative modes of transport, and repair services. SEOs have historically answered societal needs that were not (totally) fulfilled by the state or by the market, such as access to employment, to education, to social care, to housing, to culture etc. (Mertens, 2010). Nevertheless, it is imperative to address these societal needs, as meeting them is vital for respecting planetary boundaries and fulfilling the basic social foundation, as depicted in Kate Raworth's well-known and illustrative "doughnut" model.¹⁰ In this context, SEOs play a role in fostering a just and inclusive transition.

Second, while non-SE companies may have a social mission (e.g. Danone, Illycaffè), it often comes second to their primary aim of profit maximisation. In contrast, **SEOs are not only driven by their social purpose, but they prioritise it over profit maximisation**. This means that SEOs are more inclined to try innovative solutions even if they generate little revenue or are costly. And they do it while operating on the market and maintaining a high level of efficiency, which in turn is achieved by considering not only economic impact but the overall social impact produced by the SEO (Yunus et al., 2021). SEOs are often characterised as hybrid since they need to manage financial means and social purpose (Ebrahim & Rangan, 2014). However, even the more the commercial forms (such as cooperatives, are first and foremost driven by their social aim.

The combination of these two first features (social aim and its primacy over profit maximisation) allows SEOs to more easily avoid the traditional trade-offs between social, environmental and economic performance – or at least to deal with them more sustainably (Hudon & Huybrechts, 2017). Indeed, SEOs are better equipped for a multi-objectives approach: "*pursuing social and environmental goals within the context of an economically sustainable project*" (Hudon & Huybrechts, 2017). In this line of reasoning, they are also more prone to experiment with complex innovative practices than organisations constrained by profit maximisation. This space for experimentation and innovation can lead to concrete solutions for sustainable development and therefore contribute to transition.

¹⁰ <https://www.kateraworth.com/doughnut/>

As regards innovation, the SE is often recognised as having an ability to generate new business models. As such, the SE is well suited to implement the required fundamental changes in production and consumption systems, and also in organisation, society, finance methods and policies (European Commission, 2014). The SE is also able to establish innovative public-private partnerships, which are a fertile ground to develop initiatives strengthening the social fabric, delivering regenerative solutions and fostering new business opportunities (European Commission, 2021c).

Third, **SEOs are very often bottom-up and locally anchored organisations**. Hillman et al. (2018) explain that the autonomous nature and the local anchorage of SEOs can represent a viable means to target social, environmental and economic multiple bottom lines, thus achieving social, environmental and economic goals. As bottom-up and locally anchored organisations, SEOs are sometimes called ‘grassroot innovation’ (Seyfang & Longhurst, 2013; Seyfang & Smith, 2007) as they respond to local issues, by taking into consideration the interests and values of local communities. As a result, there are SEOs delivering goods or services to places or people generally neglected by the market or the state. As stated by Yunus et al. (2021), “*their proximity to the problems make them understand what works and what doesn’t*”. SEOs are therefore particularly well suited to respond in an appropriate manner.

Finally, SEOs are characterised by **democratic and/or participatory governance**. Through participatory and democratic mechanisms, they empower stakeholders who are not traditionally given a voice and provide a major avenue towards social justice and social changes. But some of them have developed exemplary practices in terms of deliberation and self-governance. These specific practices of deliberation and self-governance allow them to develop highly appropriate answers to real societal needs.

Therefore, in view of the green and digital transitions, SEOs present valuable advantages to help consider the related social dimension, undeniably connected to those transitions, which has been underestimated for a long time.

The combination of the principles presented provides SEOs with the ability to identify local and specific emerging needs as well as the capacity to develop tailored solutions for local communities. Consequently, SEOs can be seen as more efficient, equitable collectors, organisers and distributors of resources to progress toward transitions than other market-driven organisations.

The following figure synthesises the content of the section:

At the core of SE: the key principle paving the way for a fair and inclusive twin transition

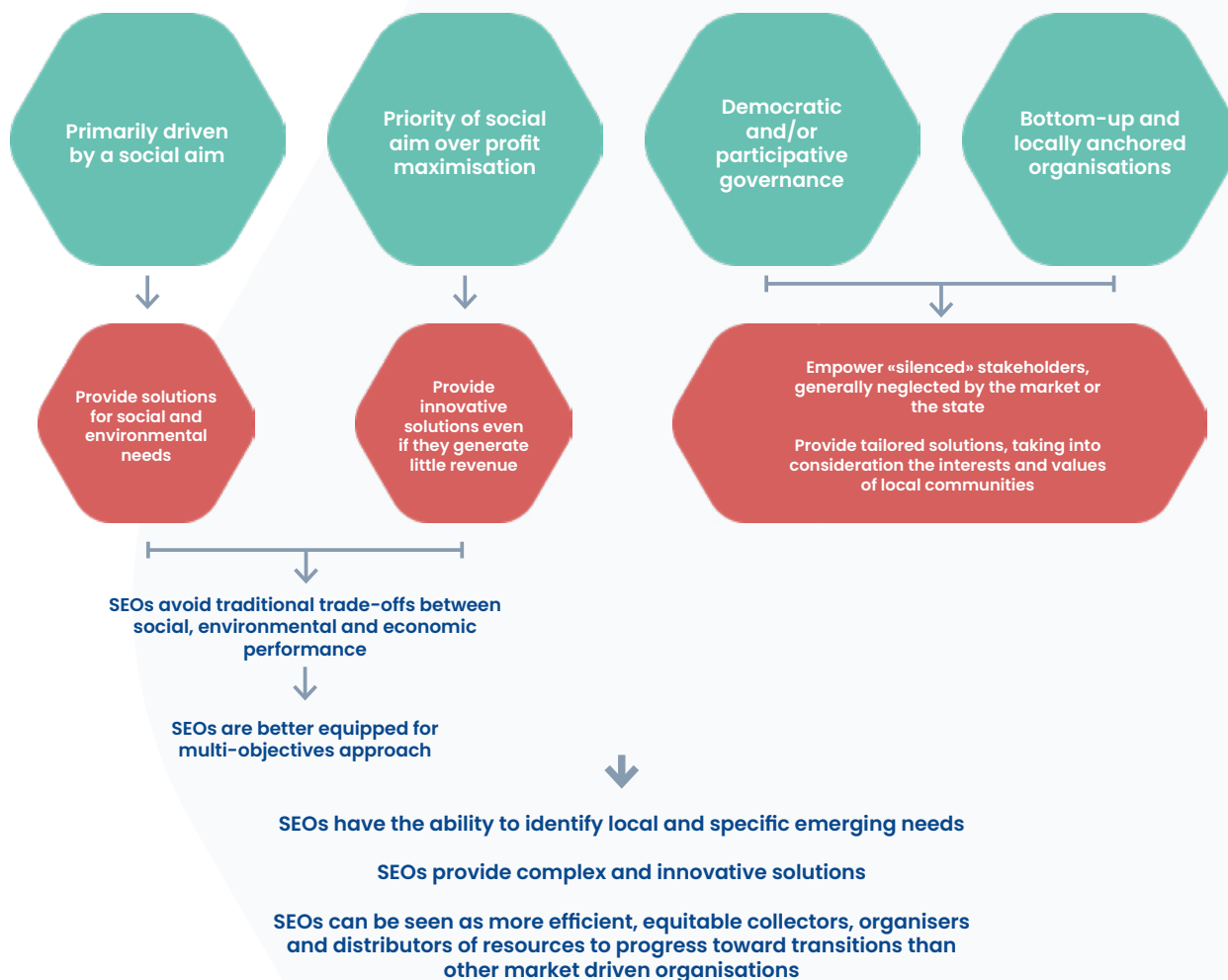


Figure 2 - Key principles of SE paving the way for a fair and inclusive twin transition. Source: Authors

Apart from the benefits that SEOs bring towards transition, as represented in figure 2, they also face some challenges that suggest more support should be brought to this ecosystem. Indeed, as suggested by Huybrecht & Hudon (2017), the road ahead for the SE ecosystem involves scaling (or several SEOs sometimes face difficulties when replicating or growing) and long-term sustainability challenges (reaching financial sustainability in the long term, dependence on subsidies. etc.).

In the following sections, our focus will shift from the core principles of SE to a more detailed exploration of the specific opportunities and challenges encountered by SEOs as they face the major challenges of our time: the green transition, digitalisation and inclusiveness.

Furthermore, we will establish connections between these challenges and the required competences and competences.

4.2 SEOs' opportunities and challenges in the face of the green transition

As outlined in the introduction, the SE has a real potential and a role to play in the challenges society is facing, namely the green transition challenge.

This **potential** is recognised by various authors. such as Costantini (2019), who writes “*Special attention on social and environmental problems is given by social enterprises that are new players in the open markets. Social enterprises are considered to be the most efficient organisations that can solve social and environmental problems in a sustainable way. Wide evidence of environment-related social enterprises is provided by various authors (Vickers, 2010)*” (p. 24). In addition, the European Commission (2021a) states that the “*Social economy contributes to the green transition by developing sustainable practices, goods and services for industrial development, for instance in the fields of circular economy, organic agriculture, renewable energy, housing and mobility*”. The SE has indeed been delivering **innovative green solutions** for a long time now, with active engagement in areas such as the circular economy, renewable energy, mobility, housing, sustainable agriculture and more (European Commission, 2021c). Consequently, social entrepreneurship is emerging as a preferred career choice to address these environmental challenges (European Commission, 2021b).

These innovative green solutions represent a direct response to the increasing awareness of climate change and the imperative to protect and preserve the environment. This growing awareness is likely to persuade an increasing number of recent graduates and individuals undergoing career changes to pursue a career in social entrepreneurship. Thus, we anticipate a rising demand for training in social entrepreneurship and, more broadly, green competences for SE ecosystems.

It is indeed necessary to equip social entrepreneurs and SEOs with such technical and operational competences as eco-leadership for instance (European Commission, Directorate General for Internal Market, Industry, Entrepreneurship and SMEs, 2022). Eco-leadership is a style of leadership in which the organisation is considered as an “*ecosystem within wider ecosystems*”. Strong connections are thus made with external ecosystems (stakeholders, customers, regulators and wider society) (Western, 2019).

Among other authors, Kwauk & Casey (2022) few countries are considering education policy that can facilitate the development of green skills for such transitions. Where policy discussions are happening, green skills are often conflated with science, technology, engineering, and maths (STEM are concerned about those competences for the green transition. They have built a “*green competences framework for climate action, gender empowerment and climate justice*”. It shows that the green transition will require specific competences that can be divided into:

- Competences for green jobs,¹¹ which, as the name indicates, aim to fulfil the requirements of green jobs and to support the transition towards a low carbon economy;
- Green life competences, which are useful for technical, instrumental, adaptive and transformative

¹¹ Green jobs are understood by Kwauk & Casey (2022) as jobs that will drive transitions to a low-carbon green economy.

purposes. These competences “*have helped to build their green “lenses” through which to view their world, identify their community’s climate vulnerabilities, and develop climate solutions that build resilience while improving their overall well-being*”.

- Competences for a green transformation, which allow the transformation of unjust social and economic structures.

Failing to meet this competence demand could hinder the progress of the green transition (International Labour Organisation, 2019). The necessary upskilling and reskilling¹² efforts in this context require investment in capacity-building, which is currently insufficient. This is primarily due to the lack of visibility regarding the role and potential of SEOs in the green transition, as highlighted by the European Commission (2021).

Moreover, while Kwauk & Casey’s framework can be valuable in identifying and describing missing competences for the green transition, it is important to acknowledge that the unique nature of SEOs necessitates specific competences. These include competences related to the green transition. For instance, the skill of “environmental and ecosystem management”, which is pertinent to green jobs, will require a distinct approach within a SEO context, given its typically local anchoring and its collaboration with a diverse range of stakeholders. These observations suggest the pertinence of the baSE project.

Furthermore, it is essential to recognise the need for a comprehensive framework to facilitate upskilling and reskilling efforts for the green transition. Such a framework should encompass various components, including financial mechanisms that support knowledge transfer, the exchange of best practices, targeted training programmes and peer-to-peer learning initiatives, among others (Kowalska et al., 2022). Given that SEOs are increasingly seen as pivotal players in the green transition, the demand for well-trained and skilled workers in the field of green transition within the SE should not be underestimated.

4.3 SEOs’ opportunities and challenges in the face of digitalisation

Digitalisation presents both **opportunities and challenges** for the SE, which is why this matter can be considered as crucial (Executive Agency for Small and Medium-sized Enterprises et al., 2020).

On one hand, as stated by Charlier (2019), digitalisation is **part of the evolution of society**, so the SE should embrace it in order to propose digital solutions that are ethical and fair. Not being part of the digital transition would represent a high risk for SEOs of **losing visibility and effectiveness** in a fast-changing world (Social Good Accelerator et al., 2022).

On the other hand, the broad societal challenges imposed by digitalisation call for (new or established) SEOs that can address these challenges. Digitalisation implies the creation or renewal of jobs, presenting

¹² *Upskilling* is learning new competences or teaching workers new competences, whereas *reskilling* consists in learning new competences so that you can do a different job (Cambridge dictionary).

both opportunities and risks, including the potential polarisation of employment (Lacroix et al., 2023). Additionally, it is essential to recognise that digitalisation extends beyond its impact on jobs; it exacerbates the digital divide among the population. These situations may contribute to growing inequalities. The SE most probably has a role to play in this context. The EU Pact for Competences recognises the SE as a vector of labour market inclusion and of an inclusive green and digital transition (Social Economy & Proximity Competences Alliance, 2023). Some even argue that digital acculturation is the responsibility of SEOs, as they can act as transmission belts to the public, which sometimes has great difficulty in adopting digital tools (Social Good Accelerator et al., 2022). More generally, CIRIEC¹³ highlights the fact that technological mutations generate ethical questions that cannot be answered without taking the collective interest into account, a task well-suited for SEOs as we have already established (*Roadmap for the social economy action plan - Consultation launched by the European Commission, 2021*).

At the same time, digitalisation represents, for all organisations, the opportunity to exchange information, to favour team cohesion, to follow and monitor actions etc. (Charlier, 2019). Digital tools are being used in the fields of employment, democratic participation, health environment, migration etc. (Social Good Accelerator et al., 2022).

The Social Good Accelerator & al. (2022) mention a **two-speed revolution** in the SE: some SEOs have been able to seize the opportunities offered by the digital transition and use alternative digital ecosystems, such as the “commons” models, in which the digital tools and/or content are shared, or “digital cooperative platforms”. For other SEOs, and they represent a majority, digitalisation is more complicated and proceeds more slowly.

Actually, the SE seems to be **under-digitalised**, which can be explained for several reasons. First, SEOs do not take advantage of the opportunities of the platform economy (Executive Agency for Small and Medium-sized Enterprises. et al., 2020). They lack expertise in the field of digitalisation (European Commission, 2021b). Second, SEOs deal with growing social needs, which they are expected to answer, they encounter difficulties in securing sustainable financing and they face growing requirements in terms of impact reporting. Budgetary constraints, shortages of digital competences and technological disparities are some of the **obstacles** that prevent the SE from embracing the digital transition. As the target audience of SEOs is partly vulnerable populations, the digital divide can also represent an obstacle (Social Good Accelerator et al., 2022). Finally, another barrier is the speed at which the SE is supposed to embrace new technologies: advanced technologies are developed primarily by and for the market economy. Therefore, they may not be directly applicable to SEOs and require some adaptation to fit with SE specificities.

The **level of SEOs' digitalisation varies**, and the way they undertake this process can take four routes, according to the Executive Agency for Small and Medium-sized Enterprises & al, (2020). The first route is specific and involves only certain functions of the SEOs. The second is gradual, which means that functions are gradually digitalised. and more and more processes automated. Thirdly, SEOs can rely entirely on digitalisation, meaning that all their processes are automated. And finally, SEOs can be fully rooted in a pure digital concept.

¹³ CIRIEC is an international association, the Centre International de Recherches et d'Information sur l'Economie Publique, Sociale et Coopérative, which means International Centre for Research and Information on the Public, Social and Cooperative Economy.

Brolis et al. (2018) have shown that digitalisation brings **tensions** for SEOs, at three levels: the level of employment quality and quantity, the level of organisational processes, and the level of service quality and nature. On employment, for instance, digitalisation can either be a source of valorisation of people's work, as workers learn new and complex competences; or be a source of depreciation as workers can gain the impression that they can progressively be replaced by robots. Examples could be given for each level of tension, but this is not the point of this section. The SE has to tackle these tensions, and transform these challenges into opportunities. But what are these challenges exactly? We can mention employment polarisation between high-skilled jobs and low-skilled service jobs at the expense of medium-skilled and routine jobs (Lacroix et al., 2023), the balance to be found between work autonomy and control (Brolis et al., 2018), or the exclusion of some publics by the digitalisation of services, which is supposed to make the services more accessible but which actually prevents some persons from using them because of the digital divide (Brolis et al., 2018). These challenges are not specific to the SE, as they can concern any enterprise, but SEOs, which have a social mission, cannot fail to protect their workers from digital tool drifts and must ensure the continuity of the provision of goods and services.

SEOs **need to acquire digital competences**, but this requires investment in the up- and reskilling of the workforce. This training has to be shaped for the SE, so that the competences and the digital tools that go with them are designed to respect and foster the principles guiding SEOs. Also, according to the social mission of the SEO, the way digital tools are implemented may vary, and with it, the way workers are trained to adopt new digital competences.

Again, the baSE project will allow some advance on this issue, as it will highlight the needs for specific competences in the SE regarding the digital transition.

4.4 SEOs' opportunities and challenges in the face of *inclusiveness*

Given their **principles and values**, SEOs are particularly suited to integrating vulnerable groups (persons with disabilities, migrants and refugees, racial and minority communities etc.). The SE proposes solutions providing work and training opportunities so that they are accessible to all, empowering communities and individuals and advocating the respect of human rights (Social Economy Europe, 2020).

One type of SEOs are **work integration social enterprises** (WISEs), which are "*autonomous economic entities whose main objective is the professional integration – within the WISE itself or in mainstream enterprises – of people experiencing serious difficulties in the labour market*" (Davister et al., 2004). Their main social mission is thus related to inclusiveness.

The SE has historically supported the **integration of people with disabilities** across all aspects of life: education, training and job opportunities, development of accessible products and services and access to information, leisure, sport and cultural activities (Social Economy Europe, 2020). The role of the SE regarding the employment of persons with disabilities is clear: SEOs "*employ up to three times more people with disabilities than traditional enterprises*" (Social Economy Europe, 2020).

Regarding **gender**, there is a lack of reliable and entirely comparable data, but the European Commission

affirms that there is globally a higher proportion of female workers in the SE (2021b). This can partly be explained by SEOs' specialisation in social sectors, which are often categorised as feminised and mainly occupied by women (OECD, 2023). However, as Dessy (2022) points in a study, the SE is often taken as an example in the matter of gender, because of the high proportion of women working in it, but this does not necessarily imply that all its practices are virtuous regarding gender equality. Indeed, the high proportion of women working in the SE does not mitigate the systemic challenges associated with gender equality and inclusiveness, such as the pay gap or proportion of men to powerful management positions. Nevertheless, gender pay and leadership gaps are lower in the SE than in the wider economy, so the SE could serve as a reference (OECD, 2023).

In addition to gender equality for women, it is crucial to also address gender equality for transgender individuals, those identifying as non-binary, and other forms of gender diversity. Similarly, there is a need to shed light on underexamined diversities, such as cultural and language diversities. The scope of inclusiveness is extensive and cuts across various dimensions. Unfortunately, there is a lack of data to comprehensively evaluate the situation within the SE ecosystem.

In other words, in the realm of the social economy ecosystem, certain social economy organisations (SEOs) can be deemed exemplary in terms of inclusion. This is because their social mission, centered on inclusion, has led them to adopt inclusive practices and to develop some inclusion competences. However, numerous aspects of diversity are still overlooked, particularly by SEOs that do not explicitly prioritise inclusiveness in their social mission. Several systematic challenges associated with various facets of inclusiveness remain, and to face those challenges, workers need specific competences, such as a deep understanding of diversity, knowledge of the legal framework, the ability to raise awareness of inclusion matters, and diversity management.

4.5 Conclusion

In the previous sections we have presented SEOs' opportunities and challenges regarding the twin transition and the inclusion challenge separately. However, it is crucial to underscore the importance of addressing these challenges as a cohesive whole rather than dealing with them independently.

In this context, concepts such as digital sobriety and digital inclusion take on great importance. Failure to consider the interconnection between these challenges could be counter-productive: the implementation of the digital transition must acknowledge the challenges posed by rare and scarce resources, just as the twin transition cannot be envisaged without embracing the entire spectrum of the population and emphasising inclusiveness in the process. Moreover, addressing these intersecting challenges collectively can be advantageous. There are opportunities to promote inclusion in digitalisation for individuals with disabilities (Duplaga, 2017), as well as for women and others.

As highlighted by the European Commission (2021d): *“The digital competences of women in innovative technologies remain a largely untapped potential”. The growth and diversification of the green and digital sectors, traditionally dominated by males, can also create new avenues for women. Furthermore, the involvement of women in decision-making positions represents an opportunity for the green transition, as it “could bring more sustainable decisions and action”* (OECD, 2023).

In conclusion, the SE has traditionally foreseen the challenges society was facing. In the current situation, the SE is confirming this trend as SEOs are spearheading the green and digital transitions (European Commission, 2021c). Moreover, the citizen and collective dimension and the ability to be inclusive make the SE an important lever to tackle the inclusiveness, green and digital challenges (Roadmap for the social economy action plan - Consultation launched by the European Commission, 2021). The European Commission's words about the SE's contribution to these transitions are clear: *"It boosts diverse modes of entrepreneurship and creates regenerative growth models. It drives social innovation by bringing forth novel bottom-up solutions to tackle social, societal and environmental challenges both in disadvantaged regions and in the most economically robust regions. Moreover, it empowers citizens and communities to benefit from the green and digital transition and to perceive it as an opportunity"* (2021c). In addition, the United Nations has recently (27th March 2023) adopted a resolution entitled *"Promoting the social and solidarity economy for sustainable development"* (resolution A/77/L.60), recognising the ability of the SE to contribute to the Sustainable Development Goals, its contribution to decent work and inclusive economics etc.

It seems that the SE's role regarding the inclusiveness, green and digital challenges no longer need to be proven. It is now important to give the SE the true resources it deserves, starting with competences.

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