

RECOGNITION OF PRINCIPLES OF SOCIAL ECONOMY IN THE ACTIVITIES OF COMMUNITY INITIATIVES IN LATVIA

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Abstract

The article advocates the principles of Social Economy (SE) as possibility to develop innovative social technologies for the social cohesion of society in situation of economic breakdown. The concept of Social Economy can be considered as European tradition and challenge for applying and finding sustainable forms of social inclusion on national level. The purpose and the object of the study is to investigate, which spheres and principles of SE are evident in the activities of community initiatives in Latvia thus establishing the recognition level of conceptual understanding and practice of Social Economy in national context among the Third Sector activities in Latvia and specifically non-profit movements. The overview of selected community initiatives showed there are initiatives that could be (1) placed in the sphere of productive economy on the scale of a community (2) by the very marginal people involved in initiatives, (3) administered as small businesses, (4) controlled by the people involved with democratic means of decision-making and (5) supported by social services and social workers, in order to overcome social exclusion.

KEY WORDS: social economy principles, social inclusion, co-operatives, mutual societies, associations, community initiatives, productivity, social work practice.

Anotacija

Straipsnyje akcentuojami socialinės ekonomikos principai kaip galimybė vystyti inovatyvias socialines technologijas socialinės sanglaudos ekonominius lūžius patiriančioje visuomenėje. Terminas *socialinė ekonomika* atskleidžia europietišką tradiciją ir pastangas surasti bei pritaikyti tvarias socialinio susietumo formas nacionaliniu lygmeniu. Tyrimu siekiama iširti, kokios socialinės ekonomikos sritys ir principai aptariamai Latvijos bendruomenių inicijuojamose veiklose. Kartu siekiama atskleisti konceptualaus socialinės ekonomikos suvokimo ir praktinio taikymo lygmenį Latvijos trečiojo sektoriaus, ypač ne pelno siekiančių institucijų, veikloje. Pasirinktų bendruomenės iniciatyvų apžvalga parodė, kad jos: 1) gali būti priskiriamos bendruomenės lygmens produktyviosios ekonomikos sričiai; 2) į savo veiklą įtraukia marginalizuotus asmenis; 3) valdomos kaip smulkūs verslai; 4) valdomos asmenų, besilaikančių demokratiškus sprendimų priėmimo principus; 5) remiamos socialinių paslaugų teikėjų ir socialinių darbuotojų, siekiant mažinti atskirtį.

PAGRINDINIAI ŽODŽIAI: socialinės ekonomikos principai, socialinė susietis, kooperatyvai, bendrijos, asociacijos, bendruomenės iniciatyvos, produktyvumas, socialinio darbo praktika.

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Introduction

Topicality of the paper is explained by the need for finding possibilities for social cohesion of marginalized people in situation of economic breakdown which results in the lack of accustomed resources of financial aids to the people in need.

As the operational sphere of social work is directly connected with providing assistance for the people in need, there appears necessity for finding innovative forms of providing assistance in such a situation. Therefore author of the paper advocates the principles of Social Economy (SE) as possibility to develop innovative social technologies for the social cohesion of society in situation of economic breakdown. The concept of Social Economy can be considered as European tradition and challenge for applying and finding sustainable forms of social inclusion on national level. Thus the purpose and the object of the study is to investigate, which spheres and principles of SE are evident in the activities of community initiatives in Latvia that help to overcome the situation of social exclusion of the people.

Attribution of principles of Social Economy has a potential of providing for the practice of social work in Latvia its European dimension and innovative practice of renewal of human potential of socially marginalized people both in urban and especially rural settings. Of great importance in situation of lacking the resources become different forms of informal and non-monetary assistance, especially strengthening the social capital of people's associations helping to overcome social depression. As the Social Economy has demonstrated that it can greatly improve the social status of disadvantaged people, the further study would focus on unfolding the concept of SE.

1. The concept and practice of Social Economy

The system of values and the principles of conduct of the popular associations, synthesized by the historical co-operative movement, are those which have served to formulate the modern concept of the Social Economy, which is structured around co-operatives, mutual societies, associations and recently foundations, although charity (charity foundations, brotherhoods and hospitals) and mutual assistance organisations had seen considerable growth already throughout the Middle Ages. During last decades growth in SE has taken place in the field of organisations producing 'social or merit goods', mainly work & social integration, providing social services and community care.

These types of organizations are known for their capacity to respond to emerging needs and new social demands, particularly in periods of crisis marked by socioeconomic transformations, especially in the areas where the market of the public sectors seem to fail (Bouchard, 2010a, p. 11). SE organizations offer support services to economic development: local development, community development, solidary financing, creation and maintenance of jobs, job insertions, etc. (Bouchard, 2010b, p. 117). They are created to meet their members' needs through

applying the principle of self-help; they are companies in which members and users of the activity in question are usually one and the same.

Speaking on wider scale, SE plays an essential role in the European economy by 1) combining profitability with solidarity, 2) creating high-quality jobs, 3) strengthening social, economic and regional cohesion, 4) generating social capital, 5) promoting active citizenship, solidarity and a type of economy with democratic values, which puts people first, 6) in addition to supporting sustainable development and social, environmental and technological innovation (The Social Economy in the European Union: Summary of the Report, 2007, p. 5–6). SE has developed from particular organizational and legal business formations (cooperatives, mutual societies, associations, social enterprises, foundations a.o. entities) in each European country.

Statistics do show that in the EU-25, over 240,000 co-operatives were economically active in 2005. They are prominent in agriculture, financial intermediation, retailing and housing and as workers' co-operatives in the industrial, building and service sectors. These co-operatives provide direct employment to 4,7 million people and have 143 million members (*Cooperatives Europe* Performance report 2006). Important source of information concerning SE legislative and operational practice in Europe is report drawn up for the European Economic and Social Committee (EESC) by CIRIEC: *The Social Economy in the European Union* (2007).

2. Social Economy values, functions and principles

SE *values* are highly consistent with the common EU objectives of social inclusion and whereas decent employment, training and re-inclusion should be linked. This links SE with the operative sphere of social policy at national level. The SE has demonstrated that it can greatly improve the social status of disadvantaged people (as in case of microcredit or savings-and-loans cooperatives, facilitating financial inclusion, increasing women's influence) and that it has a substantial capacity for social innovation, encouraging those facing difficulty to find solutions to their own social problems, as regards reconciling their professional and private life, gender equality, the quality of their family life, and their ability to care for children, elderly people and people with disabilities (The Social Economy in the European Union: Summary of the Report, 2007, p. 5).

SE has been recognized on the level of the European Parliament as the cornerstone of the European social model (Report on a European Social Model for future, 2006). The level of national acceptance relates to the level of recognition: 1) of the concept (and its term), the Social Economy; 2) to the recognition of similar con-

cepts ‘Social Enterprises’, ‘Non-profit sector’ and ‘Third sector’; and finally 3) to the recognition of other concepts. Legislative and conceptual studies have shown that Latvia is a country with a *medium (relative) level* of acceptance of the concept of the SE (by public authorities, SE enterprises, and academic world). However, Estonia and Lithuania are considered as countries with *little recognition* of the concept of SE (see *The Social Economy in the European Union*, 2007, p. 35–38).

In the scientific field there coexist several definitions of SE: 1) social economy; 2) solidarity-based economy (mainly in French and Spanish speaking countries 3) social enterprises; 4) co-operatives; 5) non-profit or third sector – the latter two being the basic fields of discourse for SE in Latvia; the related terms *non-profit sector*, *voluntary sector* and *non-governmental organisations* enjoy a greater level of relative recognition in Latvia as well. Additionally to that some authors speak of main four analytical paradigms characterizing the specific features of SE organizations: 1) Market failure and government failures; 2) Social economy; 3) Solidary economy; 4) Civil society (Enjolras, 2010, p. 44–48) that gives the helpful discursive context for finding the characteristics of SE organizations on national level.

There exist three main social functions characteristic to SE organizations: 1) *solidary function* – where economy evolves from being a tool of solidarity to being the aim of the organization in order to provide assistance in solving life-relevant issues of the people; 2) *democratic function* – where participation potentialities allow organizations to be ‘schools of democracy’ by which its members are able to develop political skills and civic, communitarian virtues; and 3) *productive function* – that differs from that of governmental and for-profit organizations (price of products is inferior to the market price or a lack of competition on the market, although being relevant market players) (Enjolras, 2010, p. 48–52).

Being the approach based on European social model, Latvian Christian Academy has developed a profession of Caritative social work operating with the differing social work and other methodology, i.e., realizing innovative caritative technologies with a goal to stabilize the cohesion of society and the social and spiritual functioning of social objects (see Gūtmane, 2009). Caritative social worker professionally includes his own activity in this EU set system of social protection that works against exclusion of a person. Therefore when developing the principles for Caritative social work activity on the basis of those of SE, it is possible to speak about social entrepreneurship which is EU promoted concept not driven mainly by the profit motive but by social benefit to those being involved in this activity, in that way multiplying the forms of social capital for overcoming so called ‘social depression’ at urban and rural level.

Concluding, the principles of SE in present-day identification by SE organizations are:

- 1) the primacy of the individual and the social objective over capital;
- 2) voluntary and open membership;
- 3) democratic control and decision-making by the membership;
- 4) the combination of the interests of members/users and/or the general interest;
- 5) the defense and application of the principle of *solidarity, responsibility, reciprocity (social capital) and empowerment*;
- 6) autonomous management and independence from public authorities;
- 7) most of the surpluses are used in pursuit of sustainable development objectives, services of interest to members or the general interest (see The Charter of Principles of the SE, 2000).

These principles would serve as basic guidelines for finding the appropriate activities of community initiatives in Latvia later in the study.

3. The practices of Social Economy in Baltic region

Speaking of SE in numbers, the situation shows that SE in Latvia is relatively small not only in Latvia but also in Baltic countries. As for situation on 2004–2005 in Latvia, *co-operatives* and other similar accepted forms provided paid employment for 300 jobs, including 15 000 members and 34 enterprises (see Cooperatives Europe Performance report 2006). Speaking of *Agricultural co-operatives* in the same period, it provided paid employment for 510 jobs, including 8 390 members and 72 enterprises (see Report of the Social Economy in the European Union, 2007, p. 44; COGECA, General Confederation of Agricultural Co-operatives in the European Union); the number of mutual societies and associations, foundations and other similar accepted forms are not indicated.

To have a comparison among the Baltic countries, paid employment (jobs) in co-operatives, mutual societies and associations, as for 2004–2005, was as following: 1) in *Estonia*: in co-operatives – 15 250, in associations – 8 000, in mutuals – not indicated; → totally 23 250 jobs; 2) in *Lithuania*: in co-operatives – 7 700, in associations & mutuals – not indicated; → totally 7 700 jobs; and 3) in *Latvia*: in co-operatives – 300, in associations in mutuals – not indicated; → totally 300 jobs (see The Report of the Social Economy in the European Union, 2007).

4. Social Economy entities among community initiatives in Latvia

The Social Economy does not just see people in need as the passive beneficiaries of social philanthropy, but it also raises citizens to the status of active protagonists of their own destiny thus putting strong emphasis on community work in practical action possibilities at local level. Therefore the interest of further study in the context of social work possibilities can be narrowed to the following parameters: 1) finding following community practices that create useful and productive work *by* and *for* marginal people; 2) finding the social work practices that provide for possibilities of renewal of human potential of socially marginalized people in urban and rural settings and stimulating social inclusion of these people.

As the source for analyzing the community initiatives at national level has served the data basis of Zemgale NGO Support Centre and North-Kurland NGO Support centre, as well as information from Rural development centre in Daugavpils and other sources. In the first part of the Table 1 there are listed *SE entities* and corresponding *principles* concluded earlier in this study and made more explicit for recognition purposes in the *community initiatives* listed in the second part of the Table. Initiatives were selected from NGO activities from West and East regions of Latvia.

In that way based on study, which spheres and principles of SE are evident in the activities of community initiatives in Latvia and Baltic countries by studying Third Sector and looking for non-profit SE activities, the following initiatives and their constitutive principles were found as following (*see* Table 1 & 2):

Table 1. SE entities, their characteristics, and corresponding SE enterprises
 (→ *see* continuation of Table 1 on the next page)

SE entities	Characterizing principles		→
1) <i>Co-operatives</i>	<ul style="list-style-type: none"> • voluntary and open belonging to organization • equal voting rights • decisions are made by majority of votes • include members 	<ul style="list-style-type: none"> • makes investment in capital which is floating • autonomy and independence • of special importance are spheres of agriculture, producing, banking, retail business and services 	→

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SE entities	Characterizing principles		→
2) <i>Mutuals</i>	<ul style="list-style-type: none"> • voluntary and open belonging to organization • equal voting rights • decisions are made by majority of votes • membership fees are based on insurance calculations (where that is of importance) 	<ul style="list-style-type: none"> • no capital investments • autonomy and independence • medical, life and non- life, banking sector, social risks insurance, guarantee systems, housing mortgage 	→
3) <i>Associations/ volunteer organizations</i>	<ul style="list-style-type: none"> • voluntary and open belonging to organization • equal voting rights • decisions are made by majority of votes • membership fees • no capital investments 	<ul style="list-style-type: none"> • autonomy and independence • services providers, volunteer work, sports and advocacy/ representation • crucial services providers in health care, care of elderly and children and social services 	→
4) <i>Foundations</i>	<ul style="list-style-type: none"> • ruled by trustees • capital is received via donations and grants • research financing and launching, supporting international, national and local projects 	<ul style="list-style-type: none"> • allocation of subsidies in order to alleviate need of particular people • financing of volunteer work, health care and that of elderly people 	→
5) <i>Social enterprises and other entities:</i> a. <i>local action and initiative groups</i> b. <i>charitable and/or ecclesiastic entities</i> c. <i>environmental associations</i>	<ul style="list-style-type: none"> • 'non-profit institutions serving households': charities, relief and aid organisations, trades unions, professional or learned societies, consumers' associations, political parties, churches or religious societies and social, cultural, recreational and sports clubs • organizations of social utility [<i>sociālā labuma organizācijas</i>]: covering the third sector activities for public goodness, ranging from churches to culture, sports and leisure time associations: <ol style="list-style-type: none"> a) <i>the primacy of the project over activity</i> b) <i>the non-profit character and the altruistic management</i> c) <i>the social contribution of associations</i> d) <i>the democratic management</i> e) <i>existence of an official approval</i> 	<ul style="list-style-type: none"> • there is no universally accepted definition • there are social and societal goals merged with spirit of entrepreneurship of private sector • profit is invested anew in order to achieve wider social or societal goals • advocating the needs of socially marginalized people or people close to the social risk group • are registered as private enterprises, cooperatives, associations, volunteer organizations, charity or philanthropy organizations or mutuals; some are not registered as legal bodies 	→

Sources: The Charter of Principles of the Social Economy, 2000; The Social Economy in the European Union, 2007; Social Economy and MSE enterprises in EU; Conference of European Churches, 2005; Borzaga et. al., 2001; Richez-Battesti et al., 2010, p. 96

Table 1 continued

→	SE enterprises	Specification	National level (selected initiatives from West and East regions of Latvia)
→	<i>1) co-operatives</i>	Savings-and-loans cooperatives Agricultural co-operatives Microcredit co-operatives	Cooperative credit (savings-and-loans) union in Šķilbēni rural district (Daugavpils region) (20 members) Agricultural cooperative in Likсна rural district (Daugavpils region) (10 members of agricultural farms)
→	<i>2) mutuals</i>	Mutual insurance companies	
→	<i>3) associations/ volunteer organizations</i>	Flat owners' associations Agricultural coops associations	Latvian Association of Flat Owners' Cooperatives (35 coops members) Flat Owners' Adviser Center Association Latvian agricultural cooperatives Association (55 coops members) Youth volunteers centre <i>NEXT</i> (Aizpute) North Kurzeme Business Association (Dundaga)
→	<i>4) community foundations</i>	Community philanthropy foundations Support foundations Resource centers	Community foundations in cities of Lielvārde, Talsi, Madona, Valmiera, Alūksne Latvian Cultural Endowment Local community initiatives and resources centre (Rugāji region) <i>Women for Europe</i> (entrepreneurship centre for women in Roja city) <i>Rural entrepreneurs for integration of blind in labor market</i> (Liepāja)

Table 1 continued

→	SE enterprises	Specification	National level (selected initiatives from West and East regions of Latvia)
→	5) <i>social enterprises and other entities:</i>	Social enterprises 'Non-profit institutions serving households' Organizations of social utility	Employment farm for social risk groups in Skrudaliena (Daugavpils region) Academy of Philanthropy/Co-operative <i>Sāta</i> (producing and providing assistance in kind to social risk groups, Balvi region) Knitting workshops for disabled people (Ludza Society for Disabled) Social enterprise of handicraft products <i>Andelplacis</i> (Rēzekne region)
	d. <i>local action and initiative groups</i>	Societies for people with special needs Carers communities Rural partnerships Local Initiative Groups	Latvian Society for the Blind (12 branches); Liepāja Society for the Blind Latvian Umbrella Body for Disability organizations SUSTENTO Latvian Society for the Disabled Social carers' community in Kalupe rural district (Daugavpils reg.) Rehabilitation & work facilities for disabled in Medņeva (Balvi region) Orphan care centre <i>Together with us</i> (volunteer organization in Rugāji) Local societies of senior citizens
	e. <i>charitable and/or ecclesiastic entities</i>	Diaconal centers (Church) Religious societies	Deaconal centre of the Latvian Lutheran Church (13 branches in LV) <i>Caritas Latvija</i> (Catholic deaconal organization) Charity foundation <i>Agape</i> (assistance to jobless people, philanthropy)
	f. <i>environmental associations</i>	Environmental protection	Self-provisionary climate risks reducing ecological farming in South Latgale (Cultural studio <i>Speiga</i>)

Source: see 'Sources of community initiatives' in Bibliography

Table 2. The Baltic perspective (SE entities)

Estonian SE entities	Lithuanian SE entities
Community foundation in Peipsi, Viljandi, Järva; Tartu Cultural Endowment	Visaginas, Alytus, Utena, Samogitian, North Lithuanian , Papile Neighborhood and “J.L.Vynerio” Charity Community foundations
Estonian Union of Co-operative Housing Associations (over 100,000 people living in co-operative housing) www.ekyl.ee	Association of Lithuanian Credit Co-operatives (for financial inclusion), www.lku.lt; Union of Lithuanian Cooperatives

Source: Community foundations in Estonia, Latvia and Lithuania, 2005

5. European Cooperative Society – possibility for Latvia

Characterizing the situation in 2010, the national experts of the Study on the implementation of the Statute for European Cooperative Society (SCE) have provided further evaluation of the cooperative movement, describing their fields of competence (e.g., the biggest agricultural cooperatives, flat owners' cooperatives and credit cooperative societies):

1) Latvian agricultural cooperatives Association (55 coops members) established 2002; 2) Latvian Association of Flat Owners' Cooperatives (35 coops members) established 1998; 3) Legislators have taken all necessary measures to implement Regulation 1435/2003 (there is a *Law of European Cooperative Society* accepted; effective from 23.11.2006); 4) In the State Register of Enterprises there have been no single SCE registered; 5) In Latvia, there are no reward incentives to create SCE (*see Study on the implementation of the Regulation 1435/2003 on the Statute for European Cooperative Society, 2010, p. 705–706*).

Form of *European Cooperative Society* has not yet received a distribution in Latvia for the following reasons: 1) Cooperative as a form of business organization in Latvia is not popular; 2) The cooperative sector is underdeveloped and weak, there are no cooperatives producing any products; and 3) in Latvia, the presence of cooperatives are markedly in the following sectors: a) Management of apartment ownership (Latvia is an analogue of condominiums in Europe) – to 1000 cooperatives (Association of Flat Owners' Cooperatives – 35 coops members); b) Credit Society – 36 cooperatives; c) Agricultural service cooperatives – 63 (agricultural service cooperatives association members – 55); d) There are cooperatives in other industries, but their numbers are insignificant and economically they are not strongly developed.

6. Case study

National example. The already mentioned *associations of flat owners* in Table 1 (or *housing cooperatives*; in Latvian ‘dzīvokļu īpašnieku biedrība’) have increased in their number and scope of their operational activity. For example, in the city of Jūrmala alone (ca. 20 000 inhabitants) with 1 000 apartment houses in 2010 there were only 6 flat owners associations that have assumed their rights of managing the house on their own. In one year, by 2011, their number has increased to total of 37 societies and this number is continuously growing. When analyzing their belonging to the sphere of SE, the constitutive indicators of these cooperatives match the SE entity:

- origins – established in order to manage (to provide the service of managing) a house for the needs of the community of a house;
- membership – members of society: the inhabitants of a house, following the equality principle of democracy (1 person – 1 vote);
- finances – are not distributed among members but channeled for provision of service of house-managing and improving the quality of living;
- activity – directed towards people’s welfare and decent house managing, possible only via mutual managing;
- in case of dissolution, financial assets are turned into material assets for the sake of a house.

International example. Also *savings-and-loans cooperatives* recently in the world have developed diverse forms of activity, for example, providing the loans to the borrowers in poor or remote areas that are connected with the *involvement of individual relationships* (in terms of personal accountability in front of community members who are guarantors of loan, as in case of Bangladesh), and *reciprocal solidarity* (social capital value) thus securing the determination of a person in achieving his goals, keeping this determination alive. Such a loan system¹ develops a culture of thrift, hard work, savings and mutual aid. Local community-based voluntary mutual aid societies provide bottom-up delivery of health care and financial services and promotes a culture of thrift and work, especially when working among the poor. Trust-based loan bottom-up model builds human, family, and social capital by helping the poor to help each other in a voluntary and businesslike fashion that builds respect and self-esteem. Thus the poor 1) can take care

¹ When applying for a loan, a borrower needs forming a group of five from neighbourhood agreeing to meet with the group once a week; others in group cannot having next loans of one in the group is late in his payments, as it has been in the case of Grameen bank [Rural Bank] in Bangladesh.

and responsibility of themselves, 2) they can support each other, 3) and make an important contributions to society. All people, including the poor, have enormous capacity to help themselves as inside every human being there exists a precious treasure of initiative and creativity waiting to be discovered, unleashed, changing life for better (see Muhammad Yunus, 2008). Possibilities of implementation of such practices in national context ask for a separate study.

Conclusions

Raising citizens to the status of active protagonists of their own destiny, gives possibility for people in the areas dominated by the so called ‘social depression’ to overcome it by organizing themselves in groups of social initiatives. In Latvia as an example for it serves the movement of *Local Initiative Groups* (VRG) and community foundations as a promoter and initiator of (productive) community initiatives. Having accumulated enough social capital this initiative may accept and develop into form of *social entrepreneurship*, which, being the European Commission’s promoted concept of ‘a different approach to entrepreneurship’, brings original initiative as part of non-market sub-sector of Social Economy in the market or business sub-sector of Social economy, as well as being one of the social technologies of Caritative social work for social cohesion of disadvantaged and marginalized groups of society.

SE organizations have had and have a fundamental role in the improvement of social cohesion, especially in local communities for overcoming ‘social depression’. Sometimes they represent possibility of economic survival in a region as is the case of agricultural cooperatives; in other situations, they are the only viable way to solve a social problem. However, SE in Latvia is still a diffused, newly-emerged concept. The existing studies comprise only some particular parts of it making it difficult to identify it as a whole. The particular interest of the author of the study is grouped around the possibilities of SE principles attributed to the sphere of social welfare and particularly to that of social work, especially local initiatives dealing with the new social needs – social cohesion of disadvantaged and marginalized groups of society. As the overview of selected community initiatives in western and eastern parts of Latvia showed, there are appearing initiatives that could be characterized as players in the newly emerging sphere of Social Economy, being (1) placed in the sphere of productive economy on the scale of a community (2) by the very marginal people involved in initiatives, (3) administered as small businesses, (4) controlled by the people involved and (5) supported by social services and social workers. The last aspects ask for more research in detail in order to develop the more thorough vision of recognition the principles of

SE in Latvia as well as for attributing these principles to the sphere of social work in Latvia. Therefore of special importance grows the need for exploring the role of social, Caritative social and community workers, and other representatives of assistant professions at national level in helping marginal people to come out of stagnation or isolation and to become active/productive in solving their social, economic, and personal problems. Measuring the achieved result of common activity & people's associations in terms of social capital, non-monetary income or service and social added value becomes of importance as well as finding ways how the existing legislation can be revised and obstacles removed allowing the people to help themselves in the organized communitarian ways of overcoming social problems, becoming *empowered* in communities in the forms and enterprises of Social Economy that have been discussed in this paper.

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