
Social Economy and State Interventionism

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Abstract:

Purpose: The article presents in a multifaceted way the necessity of interventionism in aspects of the social economy.

Design/Methodology/Approach: The issues were examined on the basis of an analysis of the available source literature and the conclusions of the research conducted. The research methods used in the paper include a critical analysis of the source literature. To complement the literature studies undertaken, it was decided to conduct qualitative research on social economy entities and among social economy experts.

Findings: The paper points to possible actions that can be taken to develop the social economy.

Practical Implications: The results obtained can be used to formulate a model of state policy in the aspect of social economy development.

Originality/value: The issues in such a context as the one presented in the article have not been studied in Polish and foreign literature.

Keywords: social economy, interventionism, socio-economic policy

JEL classification: P16, P26, P35

Paper Type: Research article.

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1. Introduction

Regardless of the adopted line of social or socio-economic policy of the state, as the wealth of society, and thus of the state, social expectations are always higher than the available means to meet them. This argument is the rationale behind the development of the social economy sector which uses a variety of allocation methods that seek to eliminate the fundamental causes and subsequently combat the effects of social problems. It is necessary to carry out research related to the role of the state in the development of the social economy. The aim of the article is to indicate the necessity of state intervention in the development of the social economy and to develop an active scenario for the local development of social economy entities.

2. Social Economy with Emphasis on Solutions in Poland

Social economy is a contemporary concept, but the idea and practice of “social entrepreneurship” dates back to the beginning of human history (the idea of group solidarity, reciprocity). It should be pointed out that, in contrast to current arrangements, the theory and practice of social action was, until the second half of the 19th century, particularistic, voluntary and discretionary. The beginning of the 1990s initiated actions aimed at making Poland equal to the standards of developed EU countries and transferring some solutions (including the model of social economy) to the Polish socio-economic reality. A key premise for the importance and development of the social economy – both in Poland and in other countries – is the insufficient effectiveness of the state in the area of social policy based on redistributive allocation and the frailty and unreliability of governments in solving social problems, which is the result of their dependence on political choices. Limited trust in government generates the growth of NGOs, free from political choices. To sum up the considerations related to the development of the social economy sector in Poland, it should be stated that (Płonka, 2015):

- building the social economy sector is treated as a complementary element of social policy (Hantrais, 2017; Anderson, 2015; Howard *et al.*, 2020),
- measures are being taken to move the administration of the social public sector from central to regional and local levels (Chaves, 2019),
- there is the possibility of using public funds of independent and private institutions of a competitive nature (pluralism of social institutions) (Bernstein, 2015),
- there is a trend away from simple redistributive allocation towards activation policies - the welfare state should be replaced by a social investment state (Michalewska-Pawlak *et al.*, 2019, Kruszyński and Warzywoda-Kruszyńska, 2018),
- there is a shift away from the welfare role of the state towards a social investment state (Klimowicz, 2018),

- The development of state subsidiarity, civil dialogue, building a knowledge-based society (Woźniak, 2018) is strengthened in line with the principle: “from a welfare state to a welfare society”.

As indicated above, the basic distinguishing feature of the social economy sector is the application of market and redistributive allocation solutions in the fight against social problems. It should be pointed out that the social value of the social economy sector in the economy finds its support in activities based on the idea of self-help and reciprocity and in groups where there are risks related to poverty, learned or acquired incapacity, social exclusion (Spear *et al.*, 2018; Budziewicz-Guźlecka, 2019; Budziewicz-Guźlecka and Drab-Kurowska, 2020) and marginalisation. Market allocation in the social area is undoubtedly more difficult to carry out, as it requires organisational and financial commitment, which is associated with economic risk, but it does offer a number of benefits, which can be regarded as: giving meaning to the activities of vulnerable groups, removing areas at risk of marginalisation, creating new social value, reducing social pathology, accelerating and harmonising socio-economic development (Płonka, 2015).

Referring to the examined issue, it is necessary to point out the qualitative processes taking place within the social economy sector. These include changes such as (Płonka, 2015):

- from a pattern of passive membership to active membership,
- from committing to the community to professionalisation,
- from a neutral position of the state in relation to social economy entities to the implementation of a supporting and cooperative function (e.g., foundations, associations, occupational therapy workshops, occupational activation centres, social integration centres, social cooperatives).

Summing up the considerations on the essence of social economy, we should also refer to the functions of social economy, in the context of the Polish model of social economy. The basic functions of the social economy include (Evers and Laville, 2004):

1. Creation of new jobs for designated social groups, based on market allocation, in the Polish model this type of entities is a classic pillar of social economy of the self-help type, e.g., development of cooperatives, mutual insurance companies, (Mierzwa and Jankiewicz, 2017), and their activities economise state social policy and create an additional labour market.

2. Balancing processes based on “market and social state failure” to safeguard social services, especially those aimed at marginalised people or those at risk of social marginalisation, to enable them to transfer to the so-called “first labour market”, especially where the private or public sector is unable to meet social needs (development of social cooperatives, social enterprises, some public benefit organisations). This sector is based on market and non-market allocations with

intervention from the state and European Union programmes (McDowell, 2017; Struben *et al.*, 2020).

3. The creation of social capital in the form of policies of social inclusion, cohesion, sustainable socio-economic development of different social groups, carried out by an active social policy of the state, in which there is a shift away from simple redistributive allocation towards activation policies (Mering, 2020) and the welfare state is replaced by a social investment state. This direction of development, based mainly on non-market allocation, started to develop in Polish conditions after Poland's accession to the EU in the framework of benefiting from various cohesion programmes supporting this direction of state social policy.

4. Supporting processes of democratisation, tolerance, civil liberties, social awareness (Boulianne, 2016), environmental awareness, as a direction developing in Poland since the economic transition period and activating individuals and social groups in political decision-making processes.

3. State Interventionism in the Aspect of Social Economy

Referring to the problem of involvement of the state in the activity of social economy entities, it is necessary, first of all, to bring closer the issues of interventionism. The key forms of state interventionism are monetary policy (e.g., setting interest rates, fiscal and tax policy), state subsidies for industries or companies that are unprofitable but fulfil important social functions, currency protectionism and customs policy, protecting the internal market while stimulating exports, and all state investments undertaken to stimulate demand for consumer goods (here we can mention all kinds of public works, construction investment projects). Nowadays, a number of objectives can be observed which are considered to require state intervention. They include the following areas (Matyszek-Szarek, 2008):

1. Social - full employment, counteracting unemployment, eliminating social exclusion and marginalisation of social groups, satisfying social needs, shaping the broadly defined conditions of society's existence and quality of life, protecting the supply of socially important basic and network products, shortening working time, protecting the environment and natural resources.

2. Financial – fighting inflation, aiming for a sustainable balance of payments, distribution of individual income (fiscalism).

3. Economic – rapid economic growth, regulating the rate of economic growth, counteracting economic fluctuations, stimulating structural changes in the economy, shaping scientific and technological progress, introducing new technologies, improving the allocation of production factors, equalising the level of development of individual regions.

4. Political – maintenance of systemic forms.

When it comes to achieving social and economic objectives, contemporary interventionism is characterised by three main directions. The first refers to the impact of the state at the scale of sectors (meso) and individual companies (micro). The

impact at the meso level is particularly noticeable in relation to the sector of old industries and stimulating the development of sectors based on high technologies or the so-called leisure time industries, as well as supporting the sector of small and medium-sized enterprises (Dachs, 2018). The development of the social economy sector is also initiated in this form. The second direction involves a shift from interventionism implemented "after" to interventionism that anticipates and stimulates individual and economic planning, based on programming and strategy building.

These strategies should take into account the development plans of the various branches of the economy. Another direction concerns the need to move from national to supranational interventionism and the coordination of interventionist activities by groups of states. In order to achieve the actions indicated above and within the framework of the trends outlined above, the state uses three groups of tools. These include (Matyszek-Szarek, 2008):

1. Lawmaking
2. Economic programming and planning
3. Overseeing the implementation of economic policy.

These tools are used to stimulate and create social economy sector organisations. Moreover, they are implemented both at national and European Union level. Activating multi-actor and cross-sectoral dialogue and creating the space and infrastructure for such dialogue is important. In practice, this means including social economy entities also in the design and implementation of public policies in various areas. Their development of this kind of institutional capacity is proving to be crucial in tackling difficult social problems and developing rural areas. As a result, individual public policies can be conducted according to the rules of co-management (Drab-Kurowska, 2014), which, by developing various forms of partnership, can be suitably flexible, that is, adaptable to circumstances (challenges) and available resources (opportunities). Public funding for the social economy can then be considered as a type of public investment that makes it possible to adapt the regional wealth provision system to development needs and requirements, including the provision of services of general interest (Hausner, 2007).

However, this is only possible if social economy enterprises practically participate in various types of partnerships and do not operate alone and in isolation. This does not depend only on their openness, readiness and capacity for cooperation, but above all on the formation of various forms of institutionalised public-private-social partnership in their environment. In such a favourable environment, they can successfully perpetuate their distinctiveness and autonomy while engaging in cooperation for development.

4. Methodology and Results of Research on Social Economy

The analysis was based on a CATI survey of regional market experts and network organisations. Experts were interviewed as part of the study. Twenty-six experts were

surveyed. The study was conducted in Q1 2021. The selection of experts for the study was carried out using the “snowball” method, i.e., experts invited to the study indicated other experts from the research area to participate in the study, until the target research group was obtained. In the end, 26 experts made the assessment. The individual indications obtained allowed to identify the most significant advantages and barriers for the development of social economy. Due to the nature and limited volume of the article in the following part only selected results of the study will be given. The following advantages-benefits associated with the development of social economy were identified from the research:

- mobilisation of the local community for joint actions to better satisfy the needs of the residents,
- attitudes of social solidarity,
- acting for the common good,
- increasing local demand for goods and services,
- creation of new jobs,
- improving the competitiveness of the local economy through the development of networking and cooperation,
- stimulating local development.

It should be pointed out that from the experts' point of view, all benefits are relevant, due to the fact that they may vary from region to region.

The above described benefits related to the development of social economy are interrelated, complementary and reinforcing. Firstly, a social enterprise, embedded in a network of local connections, may become an effective instrument initiating and supporting local development mechanisms – contributing to the growth of welfare of local community members, fostering a better use of available resources at the local level. In addition, a social enterprise with stable economic foundations can provide a real opportunity to enter the labour market and improve the fate of people at risk of social exclusion. Finally, it can provide socially useful goods and services, thereby generating additional social benefits. It can also contribute to the development and strengthening of the role of social capital.

It is worth stressing once again that the social economy is not a panacea for all the problems addressed by public policies pursued by the state. Instead, it can be an effective and efficient instrument to support the solution of many problems. However, this requires conscious programming and use of this instrument in the public policies of the government and local governments.

During the conducted research, the main obstacles limiting the development of social economy were also identified. These obstacles include:

- unused local potential (e.g., tourism, culture),
- lack of diagnosis of needs in which social economy entities could develop,
- community aging,

- lack of intergenerational cooperation,
- lack of knowledge of regulations (programmes) that may support the development of social economy,
- difficulties in building partnerships,
- no seasonal ideas,
- low economic potential.

Once a set of obstacles had been identified and indicated, the experts were asked to determine the significance of each obstacle. The scale used by the experts ranged from 1 to 10, where 1 is the weakest rating (least important) and 10 the highest (most important, which should be eliminated most quickly). These opinions are presented in Figure 1.

Figure 1. *Significance of obstacles to social economy development in experts' opinion*



Source: Own elaboration.

From the expert point of view, the most important obstacles are: unused local potential, lack of needs diagnosis, lack of knowledge of regulations (programmes) that may support the development of social economy. These obstacles could be eliminated by top-down interventionism, which would consist of social consultations, training in aid programmes, but also by bottom-up initiatives, which would be based on encouraging activity, reciprocity of civic initiatives.

5. Survey of Social Economy Entities in the Context of State Intervention

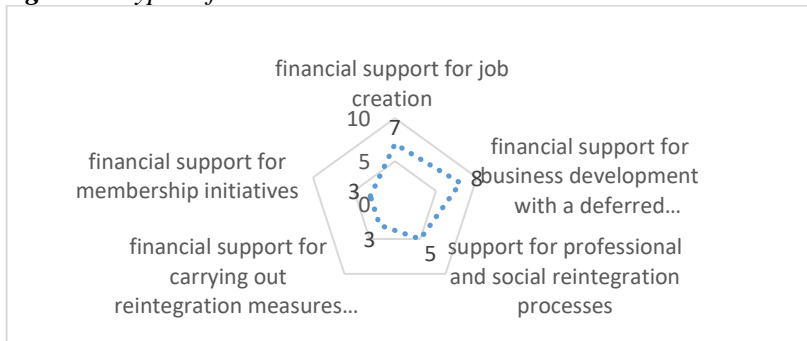
In the first quarter of 2021, a survey of 41 social economy actors in north-western Poland was carried out to identify expectations regarding state support for their development. They pointed to solutions such as non-repayable instruments, which include:

- financial support for job creation for specific groups of people;
- financial support for business development with a deferred employment effect;

- support for vocational and social reintegration processes in reintegration units for vocational activation of people at risk of social exclusion;
- Financial support for carrying out reintegration activities for employees and members at risk of social exclusion, according to the individual needs of persons and social enterprises;
- financial support for membership initiatives in marginalised areas.

The surveyed entities specified the desired level of support for non-repayable instruments on a scale from 0-10, where 1 is the lowest rating (least preferred) and 10 is the highest, most preferred. Figure 2 presents the preferred forms of non-repayable support.

Figure 2. *Types of intervention*



Source: *Own elaboration.*

The most indications among the presented types of intervention were financial support for enterprise development with deferred employment effect (8) and financial support for creating jobs for specific groups of people (7). Other types of intervention received 5 or fewer indications. Support of processes for professional and social reintegration received 5 indications. The least indications (3) concerned financial aid for employee reintegration activities and financial aid for membership initiatives.

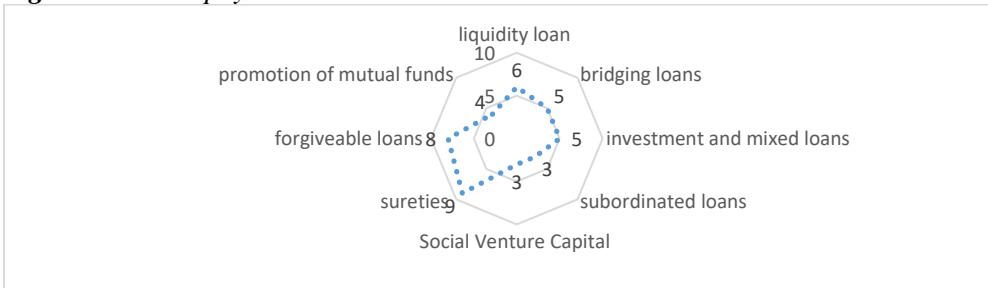
Next to non-repayable aid, repayable aid is an important tool of state interventionism. It is necessary to broaden the catalogue of repayable instruments available. However, attention should be paid to the necessity of maintaining appropriate proportions between the scale of resources allocated to non-repayable aid and repayable instruments, with the share of repayable resources in the total pool of resources for the support of social enterprises increasing. Both the scale of resources for non-repayable and repayable aid and the parameters of the individual instruments must be designed in such a way that the instruments are not in competition with each other but, at the same time, provide an opportunity for the various social enterprises to develop. The repayable type includes instruments such as:

- Liquidity loan – for current operating activities of social economy entities, short-term, with simplified procedure and prompt disbursement, simple

- promissory note collateral. There is great interest in this type of intervention. However, there is currently no such instrument available on the market.
- Bridging loans for a project or for own contribution to a project - to ensure financial continuity or the implementation of a project (in case of reimbursement) financed from structural funds or other public institutions.
 - Investment and mixed (investment + working capital) loans - investment combined with the necessary operating costs associated with its launch / development of the activity,- to cover the purchase of fixed assets (real estate, equipment, fittings, renovations, etc.),- for the implementation of contracts (e.g. stock replenishment, implementation of services, etc.),- to cover current maintenance costs,- for economic activities, both paid and unpaid (e.g., 1% income, fundraising, etc.).
 - Subordinated loans - support the acquisition of other repayable instruments: credits, loans, granted by other financial institutions (including banks), as the social economy entity with a subordinated loan becomes a more credible borrower,-are for large investments that require additional sources of financing, as one financial institution does not decide to grant the entire amount of capital in a loan,-are also for investments where a long grace period is needed,-subordinated loans are repaid at the end, after repayment of the loan granted by banks.
 - Social Venture Capital - are equity instruments (capital entry into a non-profit company) or quasi-equity instruments (e.g., subordinated loans) (Lurtz and Kreutzer, 2017).Capital entry is possible with legal forms that allow capital entry and exit -(companies only). In the case of other legal forms (association, foundation, social cooperatives), a subordinated loan instrument will be used.
 - Surety - securing the principal of a loan, e.g., up to 80% of the principal, for the entire term of the loan. The instrument should be used by institutions interested in granting loans to social economy entities, e.g., banks where they have a bank account or by financial institutions dealing with supporting social economy entities.
 - Forgivable loans - up to 50% of the loan value for realising social benefits).
 - Promoting the establishment and recapitalisation of mutual funds.

The surveyed entities defined the desired level of support for repayable instruments on a scale from 0-10. Figure 3 shows the preferred forms of non-repayable aid. Among the presented types of intervention, the instrument of surety received the highest number of indications (9). This aid is a very important financial instrument and significantly increases accessibility for those who do not have their own assets. In second position (8), forgivable loans were indicated, which would account for 50% of support, in terms of social benefits. Then there is the interest in liquidity loans, for the day-to-day operations of the entity, without serious formal restrictions, with simplified procedures, and fast disbursement times. Further repayable instruments do not attract much interest. This is due to their limited applicability, both in formal and organisational terms.

Figure 3. Non-repayable aid instruments



Source: Own elaboration.

6. Directions of Social Economy Development - Discussion

Birkhölzer (2006) distinguished four alternative scenarios of local development in relation to the social economy:

1. “development from the top”: the key actor here is the state acting from the level of central government to regional government and local authorities;
2. “development from outside”: initiated by external investors who provide key resources, in particular financial resources;
3. “waiting and watching”: local actors adopt a more or less passive or waiting attitude;
4. “development from within”: where the first option is dominated by the state, the next, by private investors, and the third by fatalism, in this scenario local actors, local people, play a priority role. It is questionable here whether all these scenarios lead to development, but also whether they should really be considered separately.

It should be pointed out that in view of the research conducted, the authors indicate that a mixed scenario should be adopted, in which state interventionism will be initiated with initiatives from within, as well as stimulated by development from outside. Figure 4 shows a mixed scenario for local social economy development.

Figure 4. Mixed scenario for local development of the social economy



Source: Own elaboration.

It should be pointed out that in specific circumstances, one of the theoretically possible approaches may prove to be dominant in the sense that others are much more difficult

to trigger. But if it is to lead to the development of the social economy, or more broadly to local development, then regardless of the starting point from which the action is launched, what is ultimately important is whether it effectively leads to the activation of local communities, i.e., organic development (Hausner, 2007).

The particular systemic advantage of social economy is that the solutions verified in its field can lead to the formation of complex systems of providing goods whose logic goes beyond the scheme of classical public goods theory. As Hausner rightly believes - it is the development of such comprehensive systems that will determine the direction of development and the future of the social economy. They will make it possible to overcome the dichotomy of production-consumption and subordination of the functioning of social economy entities to tasks commissioned to them by public administration. According to Borzaga and Santuari (2003), this means social economy actors offering new services and new forms of producing traditional services. Linking the importance of the social economy to the development of comprehensive systems of wealth provision should not be understood as meaning that social economy actors should exclusively provide some specific goods, but rather that they should provide specific goods in their own specific way. This approach implies that the formation of comprehensive (multi-sectoral and multi-level) systems of wealth provision will simultaneously affect the functioning of the market economy, the state, civil society and households. This will become all the more certain the more the social economy becomes a practical tool for the territorialisation (localisation) of solving many social problems, thus challenging the dominance of sectoral structures and hierarchical management characteristic of the traditional welfare state model. This direction of development is supported by arguments stemming from new theoretical approaches, which see the premise of the weakness of the labour market not only in its rigidity but simultaneously in the rigidity of the market for products and services (Borzaga, Santuari, 2003). In general, the social economy is helping us to form a new European social model and to move beyond the privatisation-etatisation of public services (Pestoff, 2007).

7. Conclusions

The social economy should be an open segment of the economy, as it can then best fulfil its inclusive and integrative role of fostering social cohesion. Hence, it must be seen in the modern economy not as an alternative sector but as a complementary segment. Complementarity implies difference and specificity, and autonomy, but at the same time the capacity for interdependence and cooperation. The social economy is not a concept or a solution that is intended to abolish and replace the market and the market economy, but also the functional distinctiveness and autonomy of social economy actors is intended as a barrier against private and public actors taking control of them and pushing social economy actors to the social and economic margins. The social economy is not meant to be a substitute for the market economy, but neither can it be its margin, but an important and complementary segment; an important factor and stimulator of innovation and development. Stimulating the social economy aims

to have a systemic impact. In particular, it is about testing innovative economic or management solutions in a safe - especially on a local scale - and consequently better solving social problems and thus indirectly contributing to improving the economy and the state. In short, the social economy can become an area for generating alternative solutions, tested on a safe scale, and at the same time its actors can disseminate these solutions in various fields of social activity. Thus, as Anheier (2002) emphasises with regard to the third sector Anheier (2002) – the social economy broadens the potential for solving the problems of modern societies (Hausner, 2007).

The basic feature of ventures undertaken within the social economy is the primacy of social objectives over profit-oriented activity, with the profits generated being used to finance social objectives. Social economy sector organisations operate in market niches, mainly carrying out activities that commercial companies are not interested in. They are characterised by a focus on broad participation and meeting the needs of local communities. They are often created with the participation of local authorities, meeting the needs of local communities identified, for example, during moderated “local revival workshops”. The nature of these organisations is also demonstrated by the selection of their founders – often people with a very difficult past in the labour market, recruited from among the socially excluded. By virtue of their market role (filling niches) and their social functions, these institutions deserve systematic and very strategically defined state intervention. The assistance provided to social economy enterprises is the economic activation of the most hitherto neglected persons and communities. At the same time, it should be stressed that the role of the state is to create legal regulations and conditions conducive to the creation of new jobs for communities and people with clear difficulties in finding them.

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