

Training contents SSOLEIL project. SECTION 10

## **Local and Solidarity Economy Tools for the Local Level**



**Cofinanciado por  
la Unión Europea**

## Section 10: Glossary of Social and Solidarity Economy (SSE) Terms

Definitions of key terms related to the **Social and Solidarity Economy (SSE)** are included below, with the aim of facilitating the understanding of fundamental concepts used in this eBook.

### C

- **Circular Economy:** economic model that seeks to reduce waste and reuse available resources, promoting sustainable systems at all stages of the production chain.
- **Cooperative Societies of Collective Interest (SCIC):** legal form in France which combines various actors (cooperatives, associations, companies) to develop projects with shared social and environmental benefits.

### D

- **Democratic Governance:** Organizational management model in which all people involved have equal voice and vote in decision-making.

### E

- **Energy Transition:** the process of transition towards sustainable energy systems, promoting the use of renewable sources and reducing dependence on fossil fuels.
- **Ethical Finance:** a financial system that prioritizes responsible investments, promoting projects that generate positive impacts on society and the environment.

### P

- **Pôles Territoriaux de Coopération Économique (PTCE):** local networks in France that bring together economic, social and public actors to develop SSE projects and strengthen local economies.

### R

- **Responsible Consumption:** a practice that seeks to choose products and services considering their social, economic and environmental impact, promoting values such as sustainability and justice.
- **Responsible Public Procurement:** is a management model in which public administrations, when purchasing goods and services, incorporate social, environmental and ethical criteria into their selection and award processes. It

aims to ensure that the use of public resources not only addresses economic efficiency, but also promotes sustainable development, decent employment and social inclusion. Through this approach, priority is given to the participation of entities that operate under principles of equity, sustainability and responsibility, such as cooperatives, insertion enterprises and other organizations linked to the Social and Solidarity Economy.

S

- **Social and Solidarity Economy (SSE):** a set of economic and social practices aimed at meeting human needs, based on the principles of equity, sustainability, cooperation and democracy.
- **Social Audit:** a tool to assess the economic, social and environmental impact of SSE entities, ensuring that their practices are aligned with the principles of solidarity and sustainability.
- **Social Clauses:** criteria included in public procurement processes that prioritize entities that promote social inclusion, decent employment and environmental sustainability.
- **Social Market:** network of SSE entities offering products and services aligned with ethical, solidarity and sustainable values.
- **Social Report:** an indicator that measures an organization's performance in social, economic and environmental terms, assessing its contribution to collective well-being and sustainability.
- **Solidarity Economy Networks:** connecting organizations and entities that promote SSE practices through collaboration and sharing of resources and experiences.
- **Sustainable Development Goals (SDGs):** the UN's global agenda of 17 goals designed to eradicate poverty, protect the planet and ensure prosperity for all.

## Section 11: Bibliography

The bibliography section brings together the sources used throughout the eBook, providing relevant references to delve into the Social and Solidarity Economy (SSE), its principles, tools and case studies. These references include academic papers, specialist network guides and public access digital platforms.

## 11.1. Main Sources

- **REAS Red de Redes**
  - **Carta de Principios de la Economía Solidaria** (Charter of Principles of the Solidarity Economy): Basic document detailing the six fundamental principles of SSE, applied in Spain.
  - **Auditoría Social** (Social Audit): Tool to assess the impact of SSE entities.
- **Solidarity Economy Movement (MES) France**
  - Resources and discussions on SSE in France, including models such as the SCIC and the PTCE.
- **RTES (Réseau des collectivités Territoriales pour une Économie Solidaire)**
  - **Kit of Communes and Intercommunes for the SSE**: Handbook for French local authorities wishing to implement SSE initiatives.
- **Social Economy Europe**
  - Reports and resources on SSE in the European context, including the relationship to SDGs and European Union policies.
- **Contratación Pública Responsable (Responsible Public Procurement)**
  - **Social and Environmental Clauses**: Practical guides and tools to promote strategic procurement for SSE.
- **XES (Xarxa d'Economia Solidària) Cataluña, Spain**
  - Documents and reference tools on solidarity economy in Cataluña, Spain.
- **CIRIEC-España (2022). Economía Social y Solidaria en Europa: Desafíos y Perspectivas.**
- **Unión Europea (2020). Plan de Acción para la Economía Social y Solidaria.**
- **RIPESS (2019). Guía de Buenas Prácticas en Economía Solidaria.**
- **CRESS (2020). Informe sobre la ESS en Francia.**
- **XES (2018). Manual de Economía Solidaria: Herramientas para la Transformación Social.**

## 11.2. Secondary and Complementary Sources

- **Ley 5/2011 de Economía Social (Social Economy Law 5/2011), Spain**
  - Legislative text regulating Social Economy entities in Spain, marking a milestone in their institutional recognition.

- **Loi relative à l'économie sociale et solidaire, France (2014)**
  - Legislative framework that consolidates the SSE as a key sector in the French economy.
- **Social Markets in Spain**
  - Ethical trade and responsible consumption networks.
- **Enercoop France**
  - Network of renewable energy cooperatives in France.
- **Som Energia**
  - Cooperative pioneer in renewable energies in Spain.
- **REAS Euskadi**
  - Territorial networks of SSE in the Basque Country, with specific resources for the creation of social markets and audits. used in this manual, along with other recommended materials to deepen the SSE.
- CIRIEC-España (2022). *Economía Social y Solidaria en Europa: Desafíos y Perspectivas*.
- REAS (2021). *Balance Social 2021: Indicadores de Impacto en la Economía Solidaria*.
- Unión Europea (2020). *Plan de Acción para la Economía Social y Solidaria*.
- RIPESS (2019). *Guía de Buenas Prácticas en Economía Solidaria*.
- CRESS (2020). *Informe sobre la ESS en Francia*.
- XES (2018). *Manual de Economía Solidaria: Herramientas para la Transformación Social*.

## Annex I. Training Resources

- **Training Cards: Social and Solidarity Economy for Local Authorities**

### Session 1: Introduction to the Social and Solidarity Economy (SSE)

**Duration:** 1 hour and 30 minutes

#### Objectives

- Understand what SSE is and its importance for local development.
- To know its fundamental principles and values.
- Reflect on their impact on the territory.

#### Contents

- **Origin and evolution of the SSE:** Cooperativism emerged in the 19th century as a response to the challenges of the Industrial Revolution. Over time, it has evolved to become a viable and sustainable economic alternative.
- **Fundamental Principles:** Values such as economic democracy, equity, sustainability and self-management make the difference with other models. Practical examples of their application will be analysed.
- **Differences with traditional economics:** Comparison with the conventional capitalist model, highlighting the social and sustainable approach of SSE. Individual cases where this difference is key will be reviewed.
- **Local impact and opportunities:** It will explore how SSE contributes to stable employment generation, community cohesion and sustainable development at the municipal level.

#### Examples and Case Studies

- **Pioneros de Rochdale:** Founder of the first modern cooperative in 1844, its model is still valid today.
- **REAS Red de Redes (Spain):** Organization that drives SSE through networks of collaboration and support at the municipal level.
- **Som Energia (Spain):** Renewable energy cooperative with thousands of partners, which has managed to transform the energy market with a participatory and sustainable model.

#### Methodology

- Presentation with visual support.
- Guided discussion on local experiences in SSE.
- Practical activity to identify close examples.

#### Materials

- Slide show presentation.
- Core document on SSE.
- Videos of real experiences.

## Session 2: Normative Framework and Public Policies in Support of SSE

**Duration:** 1 hour and 30 minutes

### Objectives

- Know the current legislation on SSE in Spain and Europe.
- Analyse how public procurement can boost SSE.
- Identify municipal strategies to promote this model.

### Contents

- **SSE Regulation in Spain:** Analysis of the Social Economy Law 5/2011 and its application in different municipalities.
- **EU policies:** European SSE support strategies, funding programmes and guidelines for member states.
- **Strategic public procurement:** Implementation of social and environmental clauses in municipal tenders. Examples of good practices will be discussed.
- **Barriers and opportunities:** Challenges facing local governments and proposals to overcome them.

### Examples and Case Studies

- **SSE law in France (2014):** Legislative framework that has driven the sector through funding and public procurement.
- **Public procurement in Madrid:** The reservation of public contracts to cooperatives has strengthened SSE and generated inclusive employment. One case in point is the management of school canteens by cooperatives, prioritizing healthy food and environmental sustainability.

### Methodology

- Presentation and analysis of normative texts.
- Hands-on workshop on municipal strategies for SSE.
- Simulation of the implementation of social clauses.

### Materials

- Current legislation and regulatory guides.
- Case studies of public procurement in SSE.

## Session 3: Practical Implementation of SSE in the Local Context

**Duration:** 1 hour and 30 minutes

## Objectives

- Learn to spot local opportunities for SSE.
- Know tools for their implementation at the municipal level.
- Explore successful experiences and their replicability.

## Contents

- **Participatory diagnosis:** Methods for analysing local needs and key actors in SSE.
- **Models of participatory governance:** Strategies to involve citizens in economic decision-making.
- **Social balance sheet and audit:** Assessment of the impact of SSE in economic, social and environmental terms.
- **Good municipal practice:** Successful experiences of integrating SSE into local public policies.

## Methodology

- Workshop on identifying opportunities in SSE.
- Study of experiences in Spain and France.
- Simulation of the application of social balance tools.

## Materials

- Tool guide for municipalities.
- Map of key actors in the SSE.
- Formats for diagnosis and evaluation.

## Session 4: SSE Sustainability Case Studies and Strategies

**Duration:** 1 hour and 30 minutes

## Objectives

- Analyse national and international experiences in SSE.
- Understanding financing strategies and sustainable growth.
- Design a municipal action plan to promote SSE.

## Contents

- **Success stories in SSE:** Innovative experiences in different sectors and their potential for replicability.
- **Ethical funding:** Options such as ethical banking, social investment funds and crowdfunding.

- **Growth strategies:** Methods to ensure the long-term sustainability of SSE initiatives.
- **Municipal action plans:** Development of roadmaps for the implementation of SSE in municipalities, with emphasis on planning and measuring impact.

## Methodology

- Case analysis in groups.
- Workshop on financing models.
- Development of a municipal road map for SSE.

## Materials

- Documented case studies.
- Templates for strategic planning.
- Resources on financing and institutional support.

## • Formats for SSE Diagnosis and Evaluation

### 1. Introduction

Diagnosis and evaluation are key tools for understanding the state and impact of the Social and Solidarity Economy (SSE) in a territory. These formats allow municipalities and organizations to analyse the SSE ecosystem, identify opportunities for improvement and design strategies that strengthen its development.

### 2. Format 1: Diagnosis of the SSE in the Municipality

#### Objective

Determine the current status of SSE in a territory, identifying its scope, strengths and areas for improvement.

#### Key Indicators

- Number of SSE entities registered in the municipality.
- Economic sectors in which SSE operates.
- Access to funding and public procurement.
- Level of collaboration between the different actors in the SSE ecosystem.

#### Formatting Structure

##### 1. General Information

- Name of the municipality.
- Responsible for diagnosis.
- Date on which the assessment is carried out.

##### 2. Map of Actors

- Identification of cooperatives, associations and SSE entities.
- Relationship of these actors with public administration and other sectors.

##### 3. Needs Detection

- Main problems identified in the community.
- Sectors with greater potential for SSE initiatives.

##### 4. Conclusions and Recommendations

- Identification of strengths and challenges of the SSE ecosystem in the municipality.
- Strategies to strengthen and expand SSE in the territory.

### 3. Format 2: SSE Project Impact Assessment

#### Objective

Measuring the social, economic and environmental impact of SSE projects to determine their effectiveness and sustainability.

## Key Indicators

- Job creation and working conditions in SSE initiatives.
- Level of economic sustainability of the project.
- Environmental impact and resource efficiency.
- Social inclusion and gender equity in project management.
- Degree of community participation and democratic governance.

## Formatting Structure

### 1. General Project Data

- Name of the project.
- Type of entity (cooperative, association, social enterprise).
- Project start date and duration.

### 2. Social Evaluation

- Number of persons directly and indirectly benefited.
- Employment and social inclusion strategies implemented.

### 3. Economic Evaluation

- Income generated and financial sustainability of the project.
- Sources of funding used.

### 4. Environmental Evaluation

- Measures taken for the efficient use of resources.
- Strategies to reduce the ecological footprint and promote sustainability.

- **Basic Document on the Social and Solidarity Economy (SSE)**

## 1. Introduction

The Social and Solidarity Economy (SSE) is an economic model that places people and their well-being at the centre of productive activity. Unlike the traditional system based on profit maximization, SSE is committed to equity, sustainability and cooperation as fundamental pillars for economic and social development.

## 2. Definition of SSE

SSE encompasses a wide range of economic entities and practices whose purpose is to respond to collective needs and promote the general interest. It is governed by values such as solidarity, social justice and democratic participation, prioritizing the social and environmental impact over individual profit.

## 3. History and Evolution

### Origins of Cooperativism

- **XIX century:** The Industrial Revolution generated deep labor and social inequalities, which prompted the creation of the first cooperatives as a response to these problems.
- **1844:** The Rochdale Pioneers' cooperative was founded in England, considered to be the first modern model of cooperativism based on principles of equity and self-management.
- **XX century:** The expansion of cooperativism and the evolution of the social economy gave rise to new forms of solidarity organization in different sectors and countries, consolidating an alternative economic ecosystem.

## 4. Fundamental Principles of the SSE

1. **Democracy and participation:** Decision-making is done collectively, promoting inclusion of all members.
2. **Equity and social justice:** A fair distribution of resources and benefits is encouraged, with the well-being of the community as a priority.
3. **Environmental sustainability:** Responsible production practices are promoted with the environment and efficient use of natural resources.
4. **Cooperation and solidarity:** Support and collaboration networks are being built between entities to strengthen the socio-economic fabric.
5. **Local and community development:** It is committed to strengthening the economy from a territorial perspective, promoting employment and social cohesion.

## 5. Differences Between SSE and Conventional Economics

| **Appearance** | **Conventional Economy** | **Social and Solidarity Economy** |  
 Maximization of economic benefit | Social and environmental welfare generation |  
**Property** | Private or corporate | Collective and democratic | **Management** |  
 Hierarchical | Participatory | **Distribution** | Profit for shareholders | Fair distribution and  
 reinvestment in the community | This table reflects how the SSE puts emphasis on  
 people and their well-being, in contrast to the traditional economic model where  
 economic benefit is the central focus.

## 6. Impact of SSE on Local Development

- **Generation of stable and quality employment:** The SSE promotes decent working conditions and employment opportunities in sustainable sectors.
- **Strengthening the community fabric:** Social cohesion is promoted through citizen participation and democratic governance.
- **Promotion of environmental sustainability:** It is committed to responsible production models with the environment and circular economy.
- **Boosting economic resilience:** More stable and self-sufficient economies are being built locally.

## 7. Examples and Case studies

### Rochdale Pioneers (England, 1844)

- First modern cooperative based on democratic principles and equitable participation.
- His model remains a reference for current cooperativism.

### REAS Red de Redes (Spain)

- Grouping of entities that promote SSE at the local level, encouraging cooperation and social innovation.
- Promotes solidarity economy projects in different municipalities.

### Som Energia (Spain)

- Renewable energy cooperative run by its own partners.
- Promotes clean and sustainable energy production and consumption.

## 8. Role of local authorities in SSE

Public entities play a key role in strengthening the SSE through:

- **Development of public policies and regulations** to promote their development.
- **Incorporation of social and environmental clauses in public procurement** to favour SSE enterprises and cooperatives.
- **Financial and institutional support** for social economy projects through grants, training and access to resources.

- **Promoting awareness and dissemination** of SSE models as a viable and sustainable alternative.

## 9. Resources and Bibliography

- Links to SSE reference documents.
- Contact with SSE networks and platforms at national and international level.
- Complementary materials to deepen experiences and success stories.

## ● Workshop on the Identification of Opportunities in SSE

### 1. Introduction

This workshop aims to provide practical tools for participants to identify development opportunities within the Social and Solidarity Economy (SSE) in their municipalities. Through participatory dynamics, the local environment will be analysed, needs identified and innovative solutions explored from an SSE perspective.

### 2. Workshop Objectives

- Understanding the role of SSE as a driver of local development.
- Analyse the socio-economic context and identify unmet needs.
- Identify key actors and resources available to launch SSE initiatives.

### 3. Methodology

The workshop is structured in three phases which will enable participants to analyse their environment, identify opportunities and design concrete strategies.

#### Phase 1: Local Context Analysis (30 minutes)

##### 1. Map of the territory:

- Identification of existing resources in the community.
- Social, economic and environmental needs mapping.
- Recognition of key actors (institutions, cooperatives, associations, social enterprises).

##### 2. SWOT Analysis (Strengths, Opportunities, Weaknesses and Threats):

- Application of the SWOT matrix to assess SSE in the municipality.

#### Phase 2: Opportunity Identification (30 minutes)

##### 1. Idea generation:

- Identification of problems that could be solved through SSE.
- Examples of successful projects implemented in other municipalities.

##### 2. Prioritisation of opportunities:

- Assessment of the feasibility of ideas in terms of resources, impact and sustainability.
- Selection of two or three initiatives with the greatest potential.

#### Phase 3: Design of a Preliminary Proposal (30 minutes)

##### 1. Definition of objectives:

- Establish the impact that the initiative seeks to achieve.

##### 2. Development of a proposal for action:

- Identification of the actors involved.
- Identification of resources required.
- Strategies for project implementation.

### 3. Presentation and feedback:

- Each group presents its proposal and receives comments to strengthen it.

### 4. Materials Needed

- Stationery and markers.
- Templates for SWOT analysis.
- Guide with examples of SSE projects in different territories.

## • Simulation of Application of Social Balance Tools

### 1. Introduction

Social balance is a fundamental tool in the Social and Solidarity Economy (SSE), since it allows us to measure the social, economic and environmental impact of an entity. Through this simulation, participants will be able to apply evaluation tools in local organizations, facilitating their implementation in municipal management and promoting good practices in transparency and sustainability.

### 2. Workshop Objectives

- Understanding the relevance of social balance within the SSE.
- Applying assessment tools in different case studies.
- Analyse the results obtained and design improvement strategies.

### 3. Methodology

The workshop is divided into three phases combining theory and practice, enabling participants to become familiar with social balance and apply it in concrete situations.

#### Phase 1: Introduction to Social Balance (30 minutes)

##### 1. Concept and purpose:

- Definition of social balance and its usefulness in the SSE.
- Benefits of its application in municipal entities and sector organizations.

##### 2. Key indicators:

- Democratic governance and participation.
- Social and environmental impact.
- Transparency and accountability.
- Working conditions and gender equity.

#### Phase 2: Assessment Simulation (40 minutes)

##### 1. Selection of simulated cases:

- Cooperative for responsible consumption.
- Social integration enterprise.
- Fair Trade association.

##### 2. Application of evaluation tools:

- Use of questionnaires and matrices for indicator assessment.
- Identification of strengths and areas for improvement in each entity analysed.

#### Phase 3: Analysis and Conclusions (20 minutes)

##### 1. Interpretation of the results:

- Comparison of indicators between the organizations evaluated.
- Identification of good practices and areas for improvement.

## 2. Proposals for action:

- Recommendations to strengthen the social balance in SSE organizations.
- Reflection on the importance of these tools in public management and municipal decision-making.

## 4. Materials Needed

- Guide with key social balance indicators.
- Evaluation and analysis templates.
- Case studies with detailed application information.

- **Resources on Financing and Institutional Support for SSE**

## 1. Introduction

In order for the Social and Solidarity Economy (SSE) to be consolidated and expanded, it is essential to have adequate sources of financing and the support of public and private institutions. This document lists various financing options, support programs and strategies that can help strengthen and make this economic model sustainable.

## 2. Sources of Financing for SSE

### 2.1. Ethical and Cooperative Banking

The financial sector also offers alternatives aligned with SSE values, allowing access to resources without relying on traditional banking. Some of the main options are:

- **Fiare Banca Ética:** Entity that finances projects with a positive impact on society and the environment.
- **Coop57:** Solidarity financial services network providing support to cooperatives and SSE entities.
- **Triodos Bank:** Specialized in financing initiatives in sectors such as education, environment and social development.

### 2.2. Social Investment Funds

Funds are designed to support SSE ventures, facilitating their access to capital and mentoring:

- **European Social Fund (ESF+):** Supports employment and social inclusion initiatives.
- **Impact Hub Scaling Program:** Program that combines funding and mentoring for social entrepreneurship projects.
- **Seed Capital Bizkaia:** Investment fund for projects with both social and economic impact.

### 2.3. Crowdfunding and Microcredit

Crowdfunding and micro-credit are an effective alternative for projects in their early stages or with difficulties of access to traditional credit:

- **Goteo.org:** Crowdfunding platform focused on initiatives with social and cultural impact.
- **MicroBank (CaixaBank):** Financing of SSE projects and social entrepreneurship.
- **Kiva.org:** Global network providing micro-credit to social initiatives.

## 3. Institutional Support Programmes

### 3.1. European Programmes

The European Union has different programmes that support SSE through grants and funding:

- **EaSI (Employment and Social Innovation):** Initiative providing financial support to SSE entities.
- **Next Generation EU:** Fund for economic recovery with special focus on sustainability and SSE.
- **INTERREG programme:** Promotes cooperation between European regions in the field of SSE.

### 3.2. Support in Spain

At national and autonomous level, there are several initiatives that promote the development of SSE:

- **REAS Red de Redes:** Provides advice and support to SSE entities in Spain.
- **Ministry of Labour and Social Economy:** Design specific programmes to promote social entrepreneurship and SSE.
- **Municipalities and autonomous governments:** Develop grants and support programmes adapted to local realities.

## 4. Strategies for Access to Finance

To maximize funding opportunities, it is advisable to adopt several strategies:

1. **Diversification of sources:** Combining ethical banking, crowdfunding, grants and other funding channels.
2. **Partnership with public institutions:** Access to support programmes offered by municipalities and state agencies.
3. **Use of impact indicators:** Produce robust reports that demonstrate the social and environmental impact of projects, facilitating access to funds.
4. **Participation in networks and platforms:** Take advantage of collaborative spaces and collective funding that allow sharing of knowledge and resources.

- **Slide Presentation: Introduction to the Social and Solidarity Economy (SSE)**

### Slide 1: Cover

**Título:** Introduction to the Social and Solidarity Economy (SSE)

**Subtítulo:** Training for Local Authorities

**Representative image or logo**

### Slide 2: Session Objectives

- Understand what SSE is and its impact on local development.
- Identify the values and principles on which it is based.
- Reflect on their role in transforming the territory.

### Slide 3: Definition of SSE

- Economic model based on cooperation, equity and solidarity.
- Prioritizes people's well-being and social impact over economic benefit.
- Promotes sustainability and democratic management of resources.

### Slide 4: History and Evolution of the SSE

Origins in the 19th century

- Cooperativism emerges as a response to the labour problems of the Industrial Revolution.
- 1844: The Rochdale Cooperative is founded, pioneering the principles of cooperativism.
- During the 20th century, the SSE expanded and diversified into different production sectors.

### Slide 5: Fundamental Principles of SSE

- **Democracy and participation:** Decisions are taken collectively.
- **Equity and social justice:** Seeks to reduce inequalities and improve living conditions.
- **Environmental sustainability:** Promotes environmentally responsible production models.
- **Cooperation and solidarity:** Encourages networking and collaboration between entities.

- **Local Development:** Aims to strengthen the economy from a territorial perspective.

## Slide 6: Differences from Conventional Economics

| **Appearance** | Conventional Economy | Social and Solidarity Economy | **Objective** | Maximising the economic benefit | Generate social and environmental well-being | **Property** | Private / Corporate | Collective / Democratic | **Management** | Hierarchical | Participative | **Distribution** | Profit for shareholders | Equitable distribution among members | This comparison highlights how the SSE puts people and social impact at the centre of its economic activity.

## Slide 7: Impact of SSE on Local Development

- Creates stable and decent employment.
- Strengthens the community fabric and citizen participation.
- Promotes sustainable and responsible production models.
- Promotes networks of cooperation between local authorities.

## Slide 8: Examples and Case Studies

- **The Rochdale Pioneers (1844):** First modern cooperative, laying the foundations of present-day cooperativism.
- **REAS Red de Redes (Spain):** Promotes the development of SSE at municipal level through networking.
- **Som Energia (Spain):** Renewable energy cooperative that has successfully transformed the energy market from a solidarity and sustainable perspective.

## Slide 9: Role of Local Authorities in SSE

- Creation of regulations to promote SSE in the territory.
- Support for local solidarity economy networks and cooperatives.
- Facilitate access to funding and collaborative work spaces.
- Include social and environmental criteria in public procurement.

## Slide 10: Final Reflection and Debate

- How can SSE contribute to the development of our community?
- What measures can local governments take to strengthen the SSE?
- Are there similar experiences in our region?

## Slide 11: Resources and Bibliography

- SSE reference and policy documents.
- Links to networks and platforms that promote SSE.
- Case studies for specific examples.

## ● Templates for Strategic Planning in the SSE

### 1. Introduction

Strategic planning is a key element for the success and sustainability of Social and Solidarity Economy (SSE) initiatives. Having a clear structure facilitates decision-making, resource optimization and the generation of positive impacts in the territory. These templates provide a practical guide for designing effective action plans, tailored to the needs of municipalities and organizations seeking to advance SSE.

### 2. Plantilla 1: Diagnóstico y Análisis de Situación

#### Objective

Understanding the current context and challenges facing SSE in the territory, identifying development opportunities and areas for improvement.

#### Structure

##### 1. General Information

- Name of initiative or entity.
- Location and scope.
- Responsible for the diagnosis.

##### 2. SWOT Analysis (Strengths, Opportunities, Weaknesses and Threats)

- Identification of internal (strengths and weaknesses) and external (opportunities and threats) factors influencing the SSE.

##### 3. Key Actors Map

- List of SSE cooperatives, associations and networks in the territory.
- Relationship with public administration and other strategic sectors.

### 3. Template 2: Design of Objectives and Strategies

#### Objective

Define concrete objectives and effective strategies for the implementation and consolidation of SSE in the territory.

#### Structure

##### 1. Definition of Objectives

- What are the short, medium and long term objectives?
- Setting measurable and realistic goals.

##### 2. Main Strategies

- Promotion of employment and social inclusion.
- Access to finance and economic sustainability.

- Incorporation of SSE criteria in public procurement.

### 3. Evaluation Indicators

- Number of people directly and indirectly benefited.
- Degree of community involvement in the development of initiatives.
- Social and environmental impact measured over time.

## 4. Template 3: Municipal Action Plan

### Objective

Develop a detailed roadmap for the implementation and strengthening of SSE at the municipal level.

### Structure

#### 1. Priority Actions

- Creation of support networks among SSE entities.
- Development of public policies to promote SSE.
- Promotion of responsible and sustainable consumption in the community.

#### 2. Implementation Schedule

- Definition of tasks and deadlines in the short, medium and long term.
- Allocation of responsibilities and resources required.

#### 3. Monitoring and Evaluation Mechanisms

- Identification of key impact indicators.
- Continuous adjustments and improvements based on results obtained.

- **Map of Key Actors in the Social and Solidarity Economy (SSE)**

## 1. Introduction

The mapping of key actors is an essential tool for strengthening the Social and Solidarity Economy (SSE) at the municipal level. It enables the identification, connection and coordination of the different actors that form part of this ecosystem, facilitating the creation of synergies and optimising the local impact of initiatives. This guide provides a practical outline for classifying SSE actors and promoting their integration into territorial development strategies.

## 2. Identification of Key Actors

The actors that make up the SSE can be grouped into different categories according to their role in the local socio-economic fabric.

### 2.1. SSE Cooperatives and Enterprises

These organizations represent the productive engine of SSE and operate under principles of participation and equity:

- **Cooperatives of associated workers:** Companies run democratically by their own employees.
- **Insertion companies:** Productive projects that facilitate the integration into working life of groups at risk of exclusion.
- **Labor Societies:** Companies where employees are majority owners and participate in decision-making.
- **Cooperatives for responsible consumption:** Organizations that promote access to sustainable and ethical goods and services.

### 2.2. Public Institutions and Administrations

The public sector plays a key role in promoting and consolidating SSE through regulatory frameworks and financial support:

- **Municipalities and local governments:** Responsible for developing public policies to promote SSE.
- **Councils and agencies for economic and social development:** Promote sector-specific incentives and regulations.
- **Support programmes and public funding:** Funds and resources to strengthen SSE initiatives.

### 2.3. SSE Networks and Partnerships

Collaborative networks and platforms are key to connecting and strengthening SSE entities:

- **Territorial SSE networks** (Example: REAS Red de Redes in Spain): Groups of entities working together to strengthen the solidarity economy.
- **Cooperative federations**: Organizations representing and supporting cooperatives in different sectors.
- **Social entrepreneurship platforms**: Spaces that facilitate the incubation and acceleration of SSE projects.

## 2.4. Ethical and Alternative Financial Institutions

Access to finance is crucial for the growth of SSE, and ethical financial institutions play a key role in this:

- **Ethical bank** (Example: Fiare, Coop57): Banks and credit unions that finance projects with positive social and environmental impact.
- **Social investment funds**: Resources to finance enterprises and projects with SSE values.
- **Microcredit programmes**: Initiatives that enable small social entrepreneurs to access capital without relying on traditional banking.

## 2.5. Academic Institutions and Research Centres

Education and research are key to the development and dissemination of SSE:

- **Universities and specialized training centres**: Promote studies and academic programmes on solidarity economy.
- **Observatories of solidarity economy**: Analyse the impact of SSE and promote policies for improvement.
- **Social innovation initiatives**: Academic and business projects promoting new SSE-based solutions.

## 2.6. Citizenship and Consumers

Citizen engagement is essential for strengthening the SSE:

- **Responsible consumption groups**: Initiatives that promote access to sustainable and ethical products.
- **Consumer organisations**: Groups that promote conscious consumption and fair trade.
- **Social movements for a just economy**: Networks that drive changes in consumer habits and economic policies.

## 3. Strategies for Coordination and Synergy between Actors

To maximise the impact of SSE at local level, it is necessary to strengthen cooperation between different actors. Some key strategies include:

1. **Establishment of multisectoral working groups**, bringing together representatives from the SSE, public administrations and other strategic actors.
2. **Fostering partnerships between cooperatives and local governments**, facilitating access to resources and promoting supportive policies.
3. **Organization of networking events and SSE fairs**, which allow initiatives to be visible and generate opportunities for collaboration.
4. **Implementation of training and awareness-raising programmes**, aimed at both SSE actors and the general public.
5. **Use of digital platforms for collaboration between actors**, promoting information exchange and building support networks.

#### 4. Example of Map of Actors in a Municipality

Category	Example of Actor	Main Role
<b>Work Cooperative</b>	Local Services Cooperative	Community employment generation
<b>Public Administration</b>	Department of Economic Development	Policy and financial support
<b>SSE Network</b>	Network of Local	Networking and
<b>Ethical bank</b>	Fiare Banca Ética	Alternative funding
<b>University</b>	Faculty of Solidarity Economy	Research and training
<b>Consumers</b>	Responsible Consumption	Demand for sustainable

## • Current Legislation and Normative Guides on SSE

### 1. Introduction

The Social and Solidarity Economy (SSE) has a solid regulatory framework in both Spain and Europe, aimed at promoting its development and consolidation. This document contains the main laws and guidelines governing SSE, as well as normative guides to facilitate its implementation at the municipal level.

### 2. Legislation in Spain and France

#### 2.1. Social Economy Law 5/2011 (Spain)

Law 5/2011 establishes the recognition of the SSE as a differentiated economic sector, based on cooperation, equity and democratic management. Its main features include:

- Regulation of the operation of entities such as cooperatives, labour societies, mutual funds, foundations and associations of general interest.
- Prioritising collective welfare over economic profitability.
- Defining the responsibility of Public Administrations in promoting SSE through specific incentives and policies.

#### 2.2. SSE law in France (2014)

France has developed a comprehensive regulatory framework for the SSE, consolidating its recognition and strengthening its impact on the national economy. Among its most important measures are:

- Legal recognition of cooperatives, mutual societies, associations and social enterprises as essential actors in the economic model.
- Implementation of fiscal and financial incentives to strengthen the SSE.
- Creation of reserves in public procurement to favour SSE entities.
- Obligation for large companies to report their social and economic impact.
- Development of solidarity investment funds to support SSE projects.

#### 2.3. Autonomous Community Regulation in Spain

The autonomous communities have supplemented Law 5/2011 with specific regulations:

- **Cataluña:** It has its own Law on Cooperatives and regulations that favour the inclusion of social clauses in public procurement.
- **Andalucía:** Has promoted the Law for the Promotion of Social Entrepreneurship, focused on strengthening SSE initiatives.

- **País Vasco:** Law 4/2016 on the Social Economy establishes a regulatory framework that strengthens the role of the SSE in the economic and social development of the territory.

#### 2.4. Status of Self-Employed and its Relationship with the SSE

The Statute of Self-Employed incorporates provisions relevant to the SSE sector, especially with regard to associated work cooperatives. Key points include:

- Regulation of the functioning and rights of workers in cooperatives.
- Promotion of self-management and democratic decision-making within SSE entities.

### 3. European Union Policies and Strategies

#### 3.1. Action Plan for SSE in Europe (2021-2027)

This plan sets out strategic lines for consolidating the SSE in the EU member countries, with emphasis on:

- Promoting sustainable business models.
- Access to funding for SSE projects.
- Networking and platforms to strengthen collaboration between SSE entities in different countries.

#### 3.2. Public Procurement Directive 2014/24/EU

With the aim of promoting socially responsible public procurement, this directive:

- Introduces criteria for States to prioritize companies with positive social and environmental impact in bidding processes.
- Allows the reservation of contracts for SSE entities, favoring their access to the public market.
- Promotes the inclusion of environmental and social clauses in procurement processes.

#### 3.3. European SSE Support Funds

The European Union has allocated a number of funds to enhance SSE, including:

- **European Social Fund (ESF+):** Aimed at financing employment and social inclusion initiatives within the SSE.
- **EaSI Programme (Employment and Social Innovation):** Financially supports social entrepreneurship and SSE through training and financial aid.
- **Next Generation EU:** Fund for economic recovery, with a focus on SSE and sustainability projects.

### 4. Normative Guidelines for the Implementation of SSE in Municipalities

#### **4.1. Guide to Socially Responsible Procurement**

Developed by the Network of Municipalities for SSE, this guide provides tools to:

- Incorporate social criteria into public procurement processes.
- Establish mechanisms for monitoring and evaluating the social impact of awards.
- Present success stories on the implementation of social clauses in different cities in Spain.

#### **4.2. Manual of Local Public Policies for the Promotion of SSE**

This document, published by **REAS Red de Redes**, brings together effective strategies to boost SSE at the local level. Its main contributions include:

- Methods for the creation of social markets and solidarity-based economic circuits.
- Models of participatory governance adapted to municipal realities.
- Successful public policies implemented in different regions.

#### **4.3. Good Practice in SSE Regulation**

The compilation of good practices in SSE regulation provides examples of success in Spain and Europe, with recommendations for adapting local regulations to the needs of this sector.

- **Guide of Tools for Municipalities in the Implementation of the SSE**

## 1. Introduction

Local authorities play a key role in promoting the Social and Solidarity Economy (SSE). Through public policies and specific strategies, they can facilitate the consolidation of this economic model, contributing to sustainable development and social cohesion. This guide provides practical tools to strengthen SSE at the municipal level and maximize its impact on the community.

## 2. Identification and Diagnostic Tools

### 2.1. Mapping of Key Actors

To design effective policies in support of SSE, it is essential to know which entities are part of the local ecosystem. Key strategies for this process include:

- **Identification of cooperatives, associations, insertion enterprises and SSE networks** within the municipality.
- **Development of an accessible database**, facilitating coordination and networking between different actors.
- **Use of participatory methodologies** to validate and update information, involving the actors themselves in the construction of the SSE map.

### 2.2. Analysis of Local Needs

- **Surveys and interviews** with local citizens and organizations to identify areas where SSE can offer viable solutions.
- **Identification of strategic economic sectors** where SSE has growth potential.
- **Participatory workshops** to define intervention priorities and align municipal efforts with community needs.

## 3. Herramientas para la Implementación de Políticas Públicas

### 3.1. Support for the Creation and Strengthening of SSE Enterprises

The success of SSE at the municipal level depends to a large extent on institutional support and the creation of enabling environments. Some key measures include:

- **Technical and financial support programmes**, providing advice and facilitating access to resources.
- **Training in business management and social economy**, aimed at entrepreneurs and SSE entities.
- **Preferential access to municipal spaces**, allowing the use of public premises for SSE project development.

### 3.2. Public Procurement with Social and Environmental Criteria

Municipalities can encourage SSE through responsible public procurement. Key tools include:

- **Inclusion of social clauses in tenders**, ensuring that the companies awarded generate positive impact.
- **Promotion of the recruitment of cooperatives and integration enterprises**, facilitating their access to award procedures.
- **Creating incentives for suppliers committed to SSE principles**, promoting sustainable and supportive business models.

## 4. Evaluation and Monitoring Tools

### 4.1. Indicators of Impact

In order to assess the success of municipal SSE initiatives, it is essential to define monitoring indicators such as:

- **Number of jobs created** in SSE enterprises.
- **Social and environmental impact** of the projects promoted.
- **Degree of citizen participation** in the governance of initiatives.

### 4.2. Social Balance-sheet Audits

The social balance allows to measure the impact of SSE and ensure its alignment with principles of equity and sustainability. Its implementation in municipalities may include:

- **Periodic assessments of the social and environmental impact** of SSE entities.
- **Analysis of transparency and democratic management**, ensuring that entities act in accordance with SSE principles.
- **Review of annual reports and achievement of targets**, allowing for the continuous improvement of municipal strategies.

## 5. Success Stories in Municipalities

### Barcelona: Integration of Social Clauses in Public Procurement

Since 2016, Barcelona has implemented a responsible public procurement strategy, reserving contracts for SSE companies and promoting the inclusion of social and environmental criteria in bidding processes.

### Madrid: Creation of Municipal Spaces for SSE Projects

The City of Madrid has facilitated access to public spaces for SSE entities, allowing the consolidation of social entrepreneurship initiatives and the dynamization of the local economy.

### Paris: Promotion of Circular Economy and SSE Networks

The city of Paris has developed SSE support programmes as part of its circular economy strategy, promoting partnerships between local cooperatives, institutions and businesses to drive sustainable production and consumption patterns.

## ● Documented Case Studies on SSE

### 1. Introduction

The analysis of successful experiences in the Social and Solidarity Economy (SSE) allows a better understanding of the strategies and models that have achieved a positive impact in different sectors and territories. These cases serve as a reference for the implementation of similar initiatives in other contexts, facilitating their adaptation to local needs and opportunities.

### 2. Case 1: Som Energia (Spain) - Renewable Energy Cooperative

#### Context

Som Energia is a Spanish cooperative founded in 2010 with the aim of transforming the energy market through a model based on sustainability and democratic participation. The cooperative has become a benchmark in the renewable energy sector, promoting more responsible and accessible consumption.

#### Implemented Measures

- **Collective financing:** Contributions from partners to the development of energy projects.
- **Own generation of energy:** Development of renewable facilities to ensure sustainable supply.
- **Promotion of responsible consumption:** Awareness of the importance of clean and affordable energy.

#### Resultados

- More than 80,000 partners in Spain.
- Commercialization of 100% renewable energy.
- Expansion of the model to other European countries.

### 3. Case 2: La Louve (Francia) - Cooperative Supermarket

#### Context

La Louve is a cooperative supermarket located in Paris that allows its members to be both customers and volunteer workers. This model encourages participatory management and strengthens the connection between producers and consumers.

#### Implemented Measures

- **Active participation of partners:** Each member contributes to the management and operation of the supermarket.
- **Sale of local and sustainable products:** Priority given to local and fair trade products.

- **Reduction of intermediaries:** Greater accessibility to quality products at lower prices.

## Results

- More than 7,000 active members.
- Expansion of the model to other cities in France and Europe.
- Contribution to the strengthening of fair trade and local economy.

## 4. Case 3: Airbnb (Italy) - Sustainable Tourism Platform

### Context

Airbnb emerges as an ethical alternative to mass tourism rental platforms, promoting a more fair and sustainable model. Its proposal seeks to balance tourism with the well-being of local communities.

### Implemented Measures

- **Redistribution of profits:** Part of the income generated is reinvested in social and community projects.
- **Transparency and accountability:** Sustainability and equity management model.
- **Promotion of sustainable tourism:** Promotion of accommodation that respects the environment and host communities.

### Results

- Expansion to several European cities.
- Investment in community and social projects.
- Replicable model that contributes to more equitable and responsible tourism.

- **Public Procurement Case Studies in the Social and Solidarity Economy (SSE)**

## 1. Introduction

Strategic public procurement has become a key tool for strengthening the Social and Solidarity Economy (SSE). Through the inclusion of social and environmental clauses in procurement processes, public administrations can ensure that resources are directed to projects with a positive impact on the community. This document lists several successful cases in the implementation of public procurement models aligned with SSE principles in different territories.

## 2. Case 1: Strategic Public Procurement in Madrid (Spain)

### Context

Madrid has opted for a public procurement model that prioritizes SSE as a mechanism to promote social inclusion and sustainability. By reserving public contracts for cooperatives and integration enterprises, resources have been channelled to entities that generate inclusive employment and strengthen the local economy.

### Implemented Measures

- Reserve public contracts for cooperatives and integration firms.
- Prioritization of projects that promote healthy eating, work inclusion of vulnerable groups and environmental sustainability.
- Evaluation of the social and economic impact of contracting entities.

### Results

Creation and consolidation of self-managed projects.

- Strengthening the economic and social fabric at municipal level.
- Increased access of SSE entities to public procurement, fostering their growth and stability.

## 3. Case 2: Responsible Public Procurement in Barcelona (Spain)

### Context

Since 2016, Barcelona has implemented a responsible public procurement strategy, integrating social and environmental criteria into municipal tendering processes. This model has strengthened the SSE ecosystem and ensured that public funds contribute to employment generation and social cohesion.

### Implemented Measures

- Inclusion of social clauses in the contract documents.
- Market reserves for cooperatives and integration enterprises.
- Evaluation of the social impact of suppliers before contracts are awarded.

## Results

- More than 30% of municipal contracts include social clauses.
- Employment growth in cooperatives for integration.
- Greater access of SSE entities to public procurement, strengthening the local productive fabric.

## 4. Case 3: Socially Responsible Recruitment in Paris (France)

### Context

Since 2018, Paris has developed a public procurement model aligned with its circular economy and SSE strategy. Its approach seeks not only to strengthen the social and solidarity sector, but also to reduce the environmental impact of public procurement.

### Implemented Measures

- Prioritization of suppliers that demonstrate commitment to SSE.
- Use of sustainability indicators in the evaluation of tenders.
- Networking of SSE providers in the metropolitan region.

### Results

- Reduction of the environmental impact associated with public procurement.
- Greater inclusion of SSE companies in bidding processes.
- Creation of inclusive employment in strategic sectors of the local economy.

## 5. Case 4: Public Ethical Procurement Programme in País Vasco (Spain)

### Context

In 2020, the Basque Government launched a pilot programme to integrate ethical criteria into public procurement, with the aim of promoting fair trade and strengthening SSE at regional level.

### Implemented Measures

- Application of fair trade criteria in public procurement.
- Promotion of partnerships between SSE entities and government agencies.
- Creation of a SSE supplier catalogue to facilitate their access to public procurement.

## Results

- Increase in the number of contracts awarded to SSE companies.
- Strengthening the social economy network in the region.
- Increased awareness in public administrations of the importance of ethical recruitment.