



CIRIEC 1947-2022

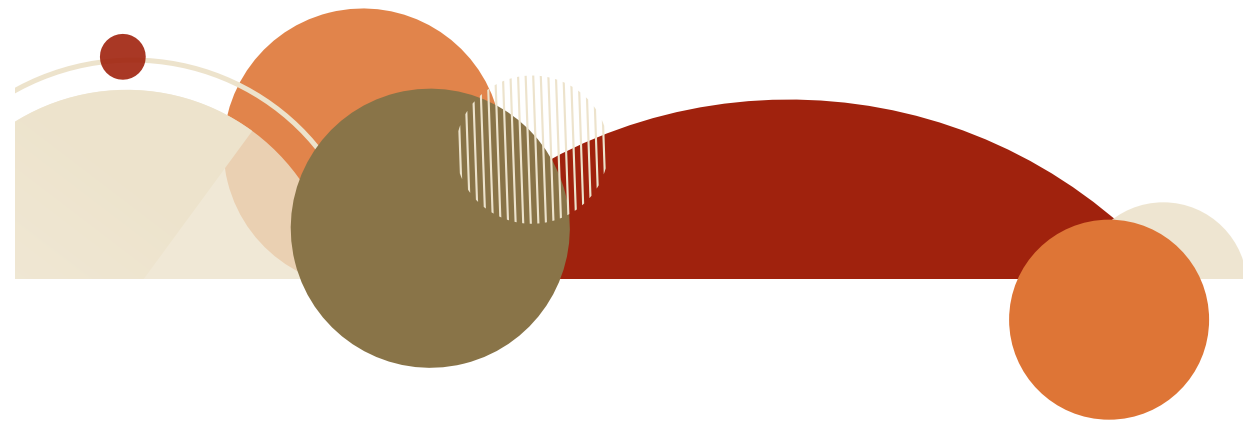
75 years of reflection and action in
favour of general interest and economic
democracy



Ludo Bettens (IHOES)

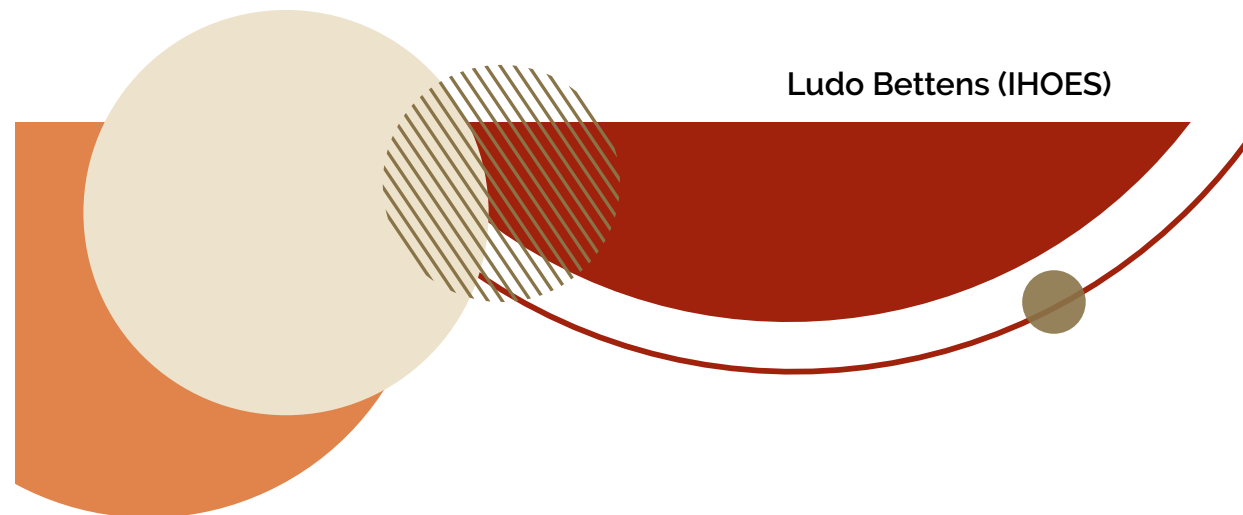
Edgard Milhaud
FONDATION • FOUNDATION





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CIRIEC (International Centre of Research and Information on the Public, Social and Cooperative Economy) is a non-governmental international scientific organization..

Its objectives are to undertake and promote the collection of information, scientific research, and the publication of works on economic sectors and activities oriented towards the service of the general and collective interest: action by the State and the local and regional public authorities in economic fields (economic policy, regulation); public utilities; public and mixed enterprises at the national, regional and local levels; the so-called "social economy" (not-for-profit economy, cooperatives, mutuals, and non-profit organizations); etc.

In these fields CIRIEC seeks to offer information and opportunities for mutual enrichment to practitioners and academics and to promote international reflection and action.

CIRIEC activities, publications and researches are realized with the support of Fédération Wallonie-Bruxelles, Région wallonne and Belgian Loterie nationale



IHOES (Institut d'histoire ouvrière, économique et sociale)

Located in the industrial valley of Liège, IHOES is a private archive center and a permanent education service recognized in this double title by the Fédération Wallonie-Bruxelles. Since 2006, it has published analyses and studies on a variety of themes (social and economic rights of workers, popular culture, multi-culturalism, secularism, education, etc.). www.ihoes.be • info@ihoes.be

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Thanks to them

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FOREWORD

75 years ago, Edgard Milhaud, Professor of political economy at the University of Geneva, founded CIRIEC, mainly to ensure the continuity of the Annals of Collective Economics journal, itself founded in 1908.

To celebrate this anniversary, we wished a book to retrace the evolution of this in many ways unique international scientific organisation. The present volume depicts not only the difficulties encountered, but also the support CIRIEC received, the opportunities seized as well as the occasions missed.

We are grateful to Ludo Bettens of IHOES (Institut d'histoire ouvrière, économique et sociale) for having accepted this challenge.

We hope that everyone who reads this quality work will be able to appreciate this original organisation. Together with its national sections and its members, CIRIEC contributes to reflection and to the sharing of information and constructive points of view between men and women of action and men and women of reflection, with a constant concern for the general interest, for the defence of human dignity and for Peace.

Today's CIRIEC is the result of the often-voluntary involvement and commitment of several generations of scientists, managers of companies and organisations. We would like to dedicate this book to them.

We would also like to thank the members of CIRIEC's permanent secretariat who brought their knowledge to this book and who ensured its production, especially Suzy Lhonneux, Barbara Sak, Christine Dussart, Coline Compère and Carmela De Cicco.

Enjoy the reading and long life to CIRIEC!

Bernard Thiry
Director of CIRIEC

Alain Arnaud
President of CIRIEC

INTRODUCTION

Most associations are rather fond of anniversary commemorations. They are often a pretext for festive events and generally bring about a feeling of pride and an attitude of self-congratulation. More rarely are they accompanied by an introspective reflection on the ground covered since the foundation of the organisation and do they provide an opportunity to take stock of its positioning with regard to the values that inspired its creation.

The International Centre of Research and Information on the Public, Social and Cooperative Economy (CIRIEC), which celebrates its 75th anniversary in 2022, belongs to the second category of associations that are not averse to reflecting on their past, admittedly to recall their founding and other illustrious episodes, but also to better understand where they come from and, with the benefit of hindsight, analyse their evolution and certain choices made. The publication in your hands is actually the third exercise of this type: in 1997, on the occasion of CIRIEC's 50th anniversary, Yvonne Gélard, the living memory of the association after forty years of good and loyal service, drafted a first historical study which, to this day, remains an indispensable source for the study of CIRIEC's first five decades¹. Ten years later, a brochure focused more specifically on the relocation of the International Centre's headquarters from Geneva to Liège, trying to understand the reasons for this fundamental, although painful choice made in 1957 by Edgard Milhaud, the founding father of the institution².

The present publication aims at complementing the previous two: its initial objective was to cover the past twenty-five years of CIRIEC. Still, its first pages do go back to 1947, when the organisation was founded. This should neither be considered proof of the institution's chronic narcissism nor of the author's disdain for the historical work achieved previously. It proved indispensable to go back to CIRIEC's origination in order to fully analyse the evolution of the association and its congruence with the values Professor Milhaud had built it on.

Right from the onset of the 20th century, this economist emphasises in his work that only the defence of the general interest, and therefore of the economic models that foster it, can ensure peace and stability in the world, at the very least in Europe. With this objective in mind, he founds CIRIEC in the aftermath of the war, in a period of bustling reconstruction. At the time, the purpose is to fight the disinformation campaigns waged by certain forces of «social reaction» (to use an expression from the recitals to the statutes) against forms of collective economy (public economy, cooperatives, social economy) which present themselves as an alternative to full-blown capitalism and promote the values of economic and social progress and democracy. To do so, Milhaud's 'weapons' of choice are: scientific research and the dissemination of verifiable information. The means of

¹ Yvonne Gélard, *1947-1997. 50 years*, Liège, Ciriec, 1997, 69 p.

² Ludo Bettens, *1957-2007. CIRIEC: 50 years in Belgium. From the shores of Lake Geneva to the banks of the Meuse - a relocation story*, Liège, Ciriec, 2007, 78 p.

action is to be the constitution of an international network in order to promote exchange between the world of science and actors on the ground working in favour of social progress (collective economy actors, political decision-makers, trade-union representatives, etc.).

The general evolution of CIRIEC, the development of its activities and the transformation of its network are at the heart of this publication, as well as the challenges it has been confronted with and the measures adopted to respond to them. But beyond and alongside its institutional history, it is also necessary to examine the strategies developed by a scientific organisation to influence the world it is part of. How to stand up to unbridled capitalism and its various embodiments and attempt to rebuff economic policies that privilege return, profitability and fiscal consolidation instead of the common good? How to contribute to setting up a different economic model focused on general interest and best defend the public, social and solidarity economy? This struggle towards more economic democracy and social justice has of course been marked by changes in the economic context, from the Glorious Thirty to recurrent crises and the deployment of the neo-liberal economic model at planetary scale. It was also influenced by the economic and political upheavals both at international level (gradual constitution of the European Union, collapse of the Soviet Bloc, etc.), and at national level (where CIRIEC has sections). This is what we shall attempt to highlight.

The publication is composed of five chapters: the first starts with the foundation of CIRIEC and closes on the Bordeaux Congress in 1988, which marks the announcement of the departure of its third director, Guy Quaden. This chapter owes hugely to Yvonne Gélard's publication and far from wishing to rival this font of information, it simply provides a quick overview, on a dozen pages, of CIRIEC's first four decades. The second chapter, which covers the explosion of the International Centre's scientific activities, closes on its 50th anniversary (1997), while the third chapter stretches from 1998, when a transversal research group was set up (covering the entirety of CIRIEC's field of research) to the eve of the important strategic planning project (2004), whose objectives and implementation are the object of chapter four, which covers the period until 2015. Finally, the «internal and financial crisis» that the International Centre experienced in the second half of the 2010s and its consequences on international representation (a.o. a considerable lessening of its Eurocentrism) are at the heart of the fifth and last chapter, stretching from 2016 to January 2022, the eve of its 75th anniversary.

To allow the reader to get a good grasp of the evolutions, changes or continuities emerging over these periods, we have adopted a relatively homogeneous structure for all chapters, except the (short) first chapter designed in the form of a summary. Each chapter opens on a brief outline of the economic (and political) context and of some salient facts in the public, social and solidarity economy. We then focus on CIRIEC's network, a fundamental element which constitutes both its main strength and its spearhead in the various countries it covers. We examine

the creation (and sometimes the disappearance) of national sections and the strategies deployed to increase the geographical reach of the International Centre. After mentioning the evolutions in governance and scientific bodies and administrative aspects (finances and team in the international secretariat), we close each chapter by examining the main activities and outstanding achievements in CIRIEC and each of its components (congresses, international conferences, scientific research, etc.) and attempt to highlight their relevance to the problems and questions of the public, social and solidarity economy.

While the first chapter relies heavily on previous work mentioned above, the sources consulted for the subsequent part of the publication all originate from the archives of CIRIEC and cover the period between 1988 and 2021: the minutes of the International Board, the Praesidium and General Assemblies; the minutes of the International Scientific Council, as well as the activity reports of CIRIEC International and those of its sections drafted on the occasion of each international congress.

Covering three quarters of a century of an international organisation represented in more than twenty countries forces one to forgo any claim to exhaustiveness. The multiplicity and diversity of the activities developed by the International Centre and each of its sections made choices necessary, which we hope have been judicious. Similarly, it was impossible to account for all the persons who have distinguished themselves in the course of this 75-year history. May every omission you find serve as an incentive to further investigate a matter that is far from having revealed all its secrets.

CHAPTER I: A FEW LANDMARKS IN THE FIRST FOUR DECADES OF THE INTERNATIONAL CENTRE (1947-1988)

1. The context of CIRIEC's inception: Edgard Milhaud's dream

Bern, 12 February 1947: Edgard Milhaud³, professor of political economy at the University of Geneva at the end of his career (he was born in 1873), together with a group of close acquaintances from Swiss political, economic and trade-union circles⁴, materialises his project of founding an «International Centre of Research and Information on the Collective Economy».



Edgard Milhaud (CIRIEC collection)

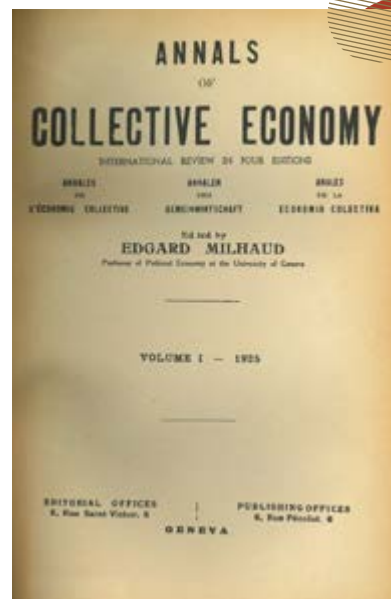
He entertains great ambitions for this scientific institution that he imagines as an international body under the aegis of the United Nations which, alongside the Economic and Social Council, would be competent for all collective economy matters. Admittedly, the primary objective of the Centre is more prosaic: to sustain the review that Professor Milhaud founded nearly four decades earlier, in 1908, under the title *Annales de la régie directe*. At the beginning of the 20th century, the French State pursues a policy of nationalisation and entrusts the public sector with various activities (e.g. a number of railway concessions, water and gas distribution) which up to then had been private company monopolies, prompting these companies to engage in defamatory press campaigns against public entities. The *Annals* intend to combat this disinformation by dedicating scientific articles to public economic services.

³ Edgard Milhaud (Nîmes, 14 April 1873 – Barcelona, 4 September 1964), graduated (*Agrégé*) of philosophy from the Sorbonne, he turns towards the study of sociology and political economy and occupies, from 1899 to 1901, the position of economic advisor at the French Ministry of Commerce and Industry, where he works a.o. with Jean Jaurès. In 1903, he is appointed professor of political economy at the University of Geneva, a position he occupies until 1948. In parallel, he engages in political action and is in charge of the secretariat of the *Fédération socialiste des Deux-Savoies* [socialist federation of Savoie and Haute-Savoie]. For a time, he holds the position of director of the research department of the International Labour Office (ILO) and from 1928 to 1936 he sits on the French national economic committee. He serves in numerous prestigious organisations (International Co-operative Alliance, Higher Consultative Committee of Commerce and Industry, etc.). Sources: J. Maitron (dir.), *Dictionnaire biographique du mouvement ouvrier français* [Biographic dictionary of the French labour movement], Vol. XIV, Paris, Les Éditions ouvrières, 1976, p. 92-96.

⁴ Draft 1948 statutes as included in Edgard Milhaud, «The International Centre For Research and Information on Collective Economy (I.C.R.I.C.E.)», *Annals of collective economy*, Jan.-Mar. 1948, Vol. 19, , p. 26-39.

It should be noted that, at the time, the review only covered part of the field of the economy of collective interest which will subsequently become its object, resulting in a change of its name to *Annals of Collective Economy* in 1925⁵. From this date onward, Milhaud adds three other editions to the French edition: an English (*Annals of Collective Economy*), German (*Annalen der Gemeinwirtschaft*) and Spanish (*Anales de la economía colectiva*)⁶ edition.

The review owes its existence only to Edgard Milhaud's determination, since he assumes alone a large part of both administrative and editorial tasks. He also ensures its financial survival and does not hesitate to invest his own financial resources to keep it afloat. After 35 years of uninterrupted publication (including during the First World War), the review stops in 1943 after the loss of all its subscribers outside Switzerland. At the end of the war, one of Edgard Milhaud's priorities is therefore to relaunch (and perpetuate) the review. Aware that he cannot achieve this task alone at his age, he imagines the International Centre of Research and Information on the Collective Economy as «a moral and scientific buttress»⁷ of the *Annals*.



makes difficult to refute. The alarm raised by Edgard Milhaud in the aftermath of the war proves to be almost visionary: he writes «As the financial difficulties of States grow, international capitalist action against all forms of collective economy is expected to become increasingly audacious and formidable. A very large scale offensive is to be anticipated (not unlike the one occurring two or three years after the last war, resulting in the enslavement of most States to the Forces of Finance). We need to provide defence, respond to attacks, safeguard our conquests, until new progress is achieved»⁸.

Hence, CIRIEC is founded in order to make up for the lack of verifiable scientific data and thereby resist the attacks of international capitalism, with the objective «to initiate and promote by all means at its disposal all forms of research and dissemination of information on collective economy existing throughout the world in its various forms and their relationships: public utility agencies, co-operative societies, co-operative public agencies, other forms of undertakings of general interest, organised economy, plan systems, etc.»⁹. The founding text already contains the main characteristic of CIRIEC's specificity: its broad field of research. It covers the various domains of the collective economy (public economy, cooperative and social economy) at international level, jointly and down to their interactions. This field of research has remained unchanged since that time (the few amendments made to the statutes in the course of the years are of a formal nature).

Milhaud's idea (as expressed in the recitals published as a preamble to the statutes) is twofold: on the one hand, the research conducted by CIRIEC will allow to rebuff the self-serving arguments of the opponents to social progress; on the other hand, by highlighting the various initiatives taken in favour of general interest and by analysing the elements that have contributed to their success (or failure), it will promote «planned co-ordination of national and international efforts aiming at common objectives.» For, in the old professor's mind, this scientific institution was not to remain isolated in its bubble. On the contrary, its work was to fuel the action of movements working for continuous social progress (trade unions, cooperative movements, progressive political movements, etc.). Thereby CIRIEC provides «*synthesis*, and on the plan of action it tends to the fruitful coordination of activities by broadening the horizons of the men of action to whom its information is destined» and through this coordination «to assist a more conscious mankind in becoming master of its destiny in an ever-increasing degree while at the same time securing the emancipation of the masses from all forms of exploitation and servitude in the full respect of the liberties and rights of the human being as well as peace»¹⁰.

5 For a more comprehensive presentation of the review and its content from its creation to 2008, see article: Éric Geerkens, «From the *Annales de la régie directe* to the *Annals of Public and Co-operative Economics: 100 years of transformation in an international economic journal*» *Annals of public and cooperative economics*, Sep.-Dec. 2008, Vol. 79, n°3-4 (special centenary issue), p. 417-460.

6 The latter will be discontinued a few years later on account of the too small number of subscriptions. Yvonne Gélard, *op. cit.*, p. 38.

7 Yvonne Gélard, *op. cit.*, p. 7.

8 CIRIEC archives, Edgard Milhaud, *Annals of Collective Economy. Annales de l'Economie Collective. Annalen der Gemeinwirtschaft* (handwritten note), [undated], p. 4-6.

9 1948 statutes as included in Edgard Milhaud, «The International Centre For Research and Information on Collective Economy (I.C.R.I.C.E.)», *Annals of collective economy*, Jan.-Mar. 1948, Vol. 19, , p. 28.

10 *Idem*

2. First steps

The organisation is modelled on the structure of the International Association for the Legal Protection of Workers and its administrative and scientific body, the International Labour Office. It has two levels: a working body and an association composed of individual or collective members (trade unions, cooperatives, etc.) and based on national sections. It also features a number of management bodies. Composed of individual members and representatives of collective members, the General Assembly held every three years, decides on general issues. Between General Assemblies, it delegates this mission to the General Council whose members it elects. A Board of Administration composed of persons residing close to the Centre is in charge of the operation of the organisation, together with the Executive Committee. It regulates the functioning of the research centre and appoints its director.

Rapidly, various political personalities (most of them linked to the socialist world), representatives of public entities and cooperatives, but also international trade-union and scientific actors offer their moral support to the undertaking and join the General Council of CIRIEC¹¹. Despite his proximity to progressive circles, CIRIEC intends to be «apolitical» and all his life, Edgard Milhaud defends tooth and nail the total freedom of the *Annals* «which can only be guaranteed by absolute independence both from political power and from the Forces of Finance»¹².

11 At political level, notably Léon Blum (leading figure of the Popular Front and former President of the Provisional Government of the French Republic), Édouard Herriot (President of the French National Assembly), Paul Ramadier (former President of the French Council), Guy Mollet (President of the French Socialist Party); Camille Huysmans (former Belgian Prime Minister), Max Buset (President of the Belgian Socialist Party - PSB) and Ernest Nobs (member of the Swiss Federal Government). Among the trade-unionists: Léon Jouhaux (Secretary General of Confédération générale du travail-Force ouvrière [General Confederation of Labour - Workers' Force] and President of the French Economic Council), Robert Bratschi (President of Union syndicale suisse [Swiss Trade Union Federation]), Paul Finet (Secretary General of Fédération générale du travail de Belgique [General Labour Federation of Belgium]) and Bernardo Ibáñez Águila (Secretary General of Confederación de Trabajadores de Chile [Confederation of Workers of Chile]). Renowned scientists, such as the French Ernest Labrousse, François Perroux and Bernard Lavergne (all three professors at the University of Paris) or the American Bryn J. Hovde (President of the New School for Social Research), provide scientific support to the project. Finally, the world of public entities and cooperatives is also present with a.o. Joseph Merlot (President of Société mutuelle des administrations publiques de Belgique - SMAP [Public Services Mutual Insurance Company of Belgium]), Georges Gausset (President of Comptoir national d'escompte de Paris), but also representatives of the international cooperative movement (International Cooperative Alliance, China Co-operative Wholesale Society, All India Cooperative Associations, Société générale coopérative of Belgium, the British Co-operative Productive Federation, the Cooperative League of the USA, etc.). See: Edgard Milhaud, The International Centre For Research and Information on Collective Economy (I.C.R.I.C.E.), *Annals of collective economy*, Jan.-Mar. 1948, Vol. 19, p. 36-37.

12 CIRIEC archives, Box «History», letter from Edgard Milhaud to Paul Lambert, 17 November 1959, p. 3. On behalf of this principle and in the same letter, Edgard Milhaud opposes a total veto to Paul Lambert's suggestion to submit a request for financial support to the Belgian Ministry of Public Instruction for the *Annals* as a «scientific publication».

3. Consolidation of an international network

It is important to very quickly reconstitute a network of subscribers that can guarantee the financial sustainability of the revue. To achieve this, Edgard Milhaud and his friends deploy a formidable blend of energy and strategy¹³; countless contacts are established, also with the aim of setting up national sections. The latter are a key element of the review, whose content they feed (with articles on the situation in their country) and disseminate, since they constitute its natural outlet. Logically, the European continent sees the creation of the first sections. Although preliminary discussions start in Switzerland (in 1947) and Belgium (in 1949), France founds the first official section of CIRIEC in 1950¹⁴. It is followed by Luxembourg and Belgium in 1951 (who merge in 1958), Austria (1952), Yugoslavia (1953), Switzerland (1954 until its disappearance in 1988)¹⁵, Greece and Italy (1956). Creating a section (and above all maintaining it in the long term) may be likened to an obstacle course: indeed, each section is dependent on the solidity of the organisations composing it (themselves influenced by the national economic context). Moreover, many sections are predicated on the commitment and dynamism of a single person; and that person's passing or withdrawal from professional life plunges them into lethargy or even sounds their death knell.

4. First achievements

CIRIEC's means mainly result from membership contributions and the income generated by its publications, which is actually limited only to the subscriptions to the *Annals of Collective Economy*, as every member automatically receives the review and a membership contribution is equivalent (or even lower) than a subscription. Since membership contributions can only be used for the publication of the *Annals*, the development of the Centre's other activities depends on any additional (voluntary) contributions, gifts or bequests. Edgard Milhaud's wish to relaunch the *Annals* is quickly fulfilled: thanks to the financial support from Union suisse des coopératives de consommation [Swiss Union of Consumer Cooperatives] and Union syndicale suisse [Swiss Trade Union Federation], the review resumes publication in 1948 in French and English and from 1951 onward in German. Conversely, there is a lack of means to operate the International Centre properly. Again, Edgard Milhaud supports the whole charge almost alone. For instance, the professor's own apartment serves as headquarters of the organisation for a long time. The organisation of the 1st International Congress

13 For instance, in 1951, Edgard Milhaud uses a meeting of the constituent assembly of the Council of European Municipalities held in Geneva to bring CIRIEC to the attention of municipality representatives. See: Yvonne Gélard, *op. cit.* p. 11.

14 CIRIEC archives, Minutes of the General Assembly of CIRIEC, Bordeaux, 22 September 1988, p. 9. For further information on the creation and existence of various CIRIEC section, see Yvonne Gélard, *1947-1997. 50 years*, Liège, CIRIEC, 1997, 69 p. and Ludo Bettens, *1957-2007. CIRIEC: 50 years in Belgium. From the shores of Lake Geneva to the banks of the Meuse - a relocation story*, Liège, Ciriec, 2007, 78 p.

15 CIRIEC archives, Minutes of the General Assembly of CIRIEC, Bordeaux, *idem*.

on the Collective Economy in Geneva (28 to 31 May 1953) gives CIRIEC real visibility at international level. More than 350 delegates from 22 countries attend what constitutes a world premiere: a meeting of representatives of all sectors of the collective economy, but also of international organisations (United Nations Organisation, International Labour Organisation, UNESCO, World Health Organisation, European Coal and Steel Community, etc.) and non-governmental organisations (International Cooperative Alliance, International Confederation of Free Trade Unions, etc.). The debates address various topical issues related to the collective economy (its role in building economic democracy and in dealing with the housing problem, the rights and duties of workers employed in various sectors of the collective economy) and result in the adoption of three resolutions. At the end of the congress, an International Commission is set up, tasked to submit a report on the organisation of CIRIEC and proposals on these matters at the next congress, planned in Liège in 1955. In parallel, other commissions are set up on the topics of housing and economic democracy, and finally a Terminology Commission chaired by Professor Gerhard Weisser of the University of Cologne (Germany) is given the mission to examine the various conceptions of the collective economy with a view to agreeing on a uniform and clear definition of this concept.



The 1st International Collective Economy Congress - Geneva, 1953
(taken from the *Coopérateur suisse*, no. 24, 10th June 1953, p. 317).

On the sidelines of the Geneva Congress, the first General Assembly of CIRIEC takes place on 31 May 1953: Edgard Milhaud, who already is director of CIRIEC, is elected president. It is decided that each national section of CIRIEC is to appoint four delegates and should strive to ensure balanced representation of the sectors comprised in the collective economy (cooperative, municipal, trade-union movements and nationalised entities). These delegates will be its representatives in the Board of Directors (until then only composed of representatives close to the head office)¹⁶. Germaine Calame is hired part-time in 1954 and soon becomes Edgard Milhaud's dedicated assistant/secretary/accountant.

¹⁶ «Minutes of the 1st International Collective Economy Congress and of the 1st General Assembly of CIRIEC», *Annals of Collective Economy*, Jan-May 1954, , p. 1-176; CIRIEC archives, Box «History», Notebook «C.I.R.I.E.C. Belgian National Section», Minutes, First International Congress on the Collective Economy.

5. Relocation years: putting down roots in Liège with Paul Lambert

While this help proves to be a real relief, it cannot hide the need to find a successor to the person who is CIRIEC's real incarnation, in order to ensure the organisation's sustainability. Edgard Milhaud is over 80 years old, and although he remains passionate and energetic, the burden on his shoulders is too heavy. Moreover, he observes that interest in CIRIEC is declining among his close acquaintances in Switzerland, who until then had been his essential support. In addition to the issue of succession, there is also the matter of the relocation of CIRIEC's head office. The 2nd International Congress in Liège in September



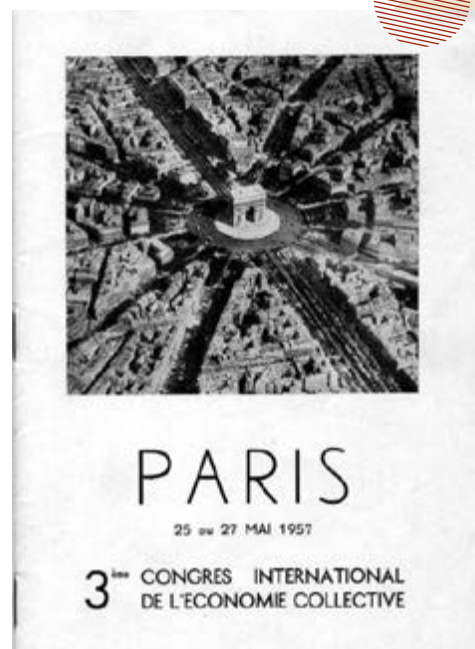
Programme of the 2nd International Collective Economy Congress - Liège, 1955
(CIRIEC collection).

1955 proves to be decisive in this respect. Dedicated to the situation of the collective economy in the context of the problems of economic expansion, the rise in living standards and full employment, the congress is again a great success. It demonstrates the dynamism of the Belgian section, its capacity to manage such a large project successfully and the Belgian authorities' interest in the collective economy. Above all, it draws the attention to the figure of Paul Lambert. This doctor of law with a Master's degree in economics of the University of Liège, a specialist on cooperatives, has recently been appointed Secretary General of the Belgian section, which he has started re-organising and developing. He equips CIRIEC Belgium with a documentation centre, launches the publication of a bimonthly bulletin, *Expériences*, and manages to convince a large number of

public enterprises, cooperatives, public administrations and trade-unions in the country to become members. The sound footing of the Belgian section is further strengthened by the obtention of its own premises in 1957¹⁷. So, on the sidelines of the 3rd International Congress in Puteaux (Paris region) in May of the same

¹⁷ For many years, the head office of CIRIEC's Belgian section is located in Liège, within the Société mutuelle des administrations publiques [Public Services Mutual Insurance Company of Belgium] (SMAP, the current Ethias) whose Vice-President, Jules Hanse, is one of the founding members of the association. Set up in 1952 at 19 rue Forgeur, the head office moves in March 1957 to an apartment he rents at 60 rue Charles Magnette. For a time, Paul Lambert entertains the hope that SMAP become the owner of the premises, but finally, another solution is adopted: in November 1957, the insurance company offers CIRIEC the use of the ground floor of a building it has just completed at 45 quai de Rome. CIRIEC will remain there until 1981, when it moves to the Sart-Tilman campus of the University of Liège.

year, it is decided to appoint Paul Lambert director of the International Centre and to relocate its head office and its permanent working body to Liège. Edgard Milhaud remains President of CIRIEC International and in charge of the *Annals* until 1960, when he passes the torch of the presidency of the International Centre to Maurice Delbouille, socialist mayor of Chênée (Liège region) and one of the founding members of CIRIEC Belgium, while Paul Lambert takes over the management of the *Annals*. At the age of 87, the old professor can finally relax: the future of his life's two great achievements (his review and his research centre) is finally ensured. He will continue to follow closely their development and take an active part in the events of the Centre until his death in 1964. One year later, Maurice Delbouille asks to be relieved of his mandate as president for Paul Lambert, who then combines the positions of Director and President of the International Centre.



Programme of the 3rd International Collective Economy Congress - Puteaux, 1957 (CIRIEC collection).

The statutes of the 'new' International Centre of Research and Information on the Collective Economy are published in the *Moniteur Belge* [Belgian official journal] on 27 July 1961. While they list, word for word, the missions defined in 1948, they insist on the scientific aspect of the association, adding that the information provided shall be «objective and reliable»¹⁸. Moreover, the new constitution defines the research object more precisely. The defence of general interest (which, as we have seen, inspired the creation of the *Annals* and, ultimately, of CIRIEC) features clearly as an objective in the new statutes, together with the development of economic democracy and (implicitly) resistance to unbridled capitalism¹⁹.

¹⁸ Until then, this notion of scientific rigour had appeared – albeit discretely – in article 3 of the 1948 statutes dealing with means of action: «[...] [CIRIEC] shall encourage and support research work undertaken [...] by individual investigators primarily concerned with securing objective and reliable information».

¹⁹ «Its research shall cover not merely the organisation, operation and development of the institutions in question and their place in the economy as a whole, but also any problems arising in relation to them. When studying these subjects the aim shall always be to safeguard the general interest and to strive for the ideal of economic democracy as these are the actual aims of the collective economy.» (Statutes published in the Belgian Official Journal, 27 July 1961, p. 6202)



Paul Lambert (CIRIEC collection)

The transfer of the International Centre to Liège is accompanied by financial re-organisation aimed at ensuring the resources for its operation: the various national sections are invited to pay an annual contribution. As sections are free to determine themselves the amount of their contribution, the Belgian section will in fact shoulder a disproportionate share of the International Centre's expenses for many years. Only in 1983 will the amount of the contributions be fixed to at least 200 000 Belgian francs (11 163 euro in 2021 prices) for 'rich' countries and 100 000 for the others.

6. Golden Sixties : les années fastes

Basking in the favourable context of economic growth, the late 1950s and the 1960s are marked by the intensification of the International Centre's activities. The review *Annals of Collective Economy* undergoes profound changes in terms of content: theoretical articles multiply at the expense of descriptive articles and a new category emerges: a chronicle of the collective economy. The review also proposes a select bibliography of this sector. In parallel, its circulation increases significantly: in 1963, it is present in 64 countries and two years later, its three editions combined reach a record figure of 2099 subscriptions. This result is mainly achieved thanks to the French edition which alone accounts for more than half of this figure²⁰.

In the 1960-1970, the internationalisation of the CIRIEC network accelerates. The International Centre reinforces its European presence with the creation of a national section in Germany (in 1960) and two short-lived sections (United Kingdom and Scotland in the 1970s); above all, it succeeds in spreading to other continents: America (with the creation of a section in Canada and Argentina, both in 1966) and even Asia (Israel in 1968 and, in the early 1970s, two short-lived sections in India and Iran)²¹.

Various commissions succeed the Terminology Commission, among them the Scientific Commission, chaired first by Gerhard Weisser, then by Theo Thiemeyer, both German. Their work over nearly 20 years mainly focuses on the public economy. Matters related to cooperation and the organisation of the economy are addressed more specifically in the CIRIEC review and at congresses.

The latter continue to punctuate the life of the International Centre every other year: Vienna (1961), Rome (1963), Berlin (1965). The military coup by the Greek

²⁰ Éric Geerkens, *op. cit.*, p. 441-442.

²¹ Yvonne Gélard, *op.cit.*, p. 20.

Colonels prevents the planned organisation of the 1967 edition in Athens. The 8th International Congress finally takes place in Liège in autumn 1968. In 1970, unable to sustain the significant expenses linked to the organisation of a congress, the Swiss section convenes an International Colloquium (limited to 300 participants) in



On the fringes of the 5th International Collective Economy Congress: Maurice Delbouille and his wife (right), Edgard Milhaud, Paul Lambert and his wife (left) - Vienna, 1961 (Paul Delbouille collection)

Montreux. After this Vaudese interlude, CIRIEC returns to its tradition of 'prestige' congresses: once more Vienna (1972), Hamburg (1974), but also Tel Aviv (1976). This is the first congress to be organised outside Europe (a practice that will be repeated, as we shall see, with the further development of the International Centre). Being the first to tackle the question of the crisis, this congress is a milestone in CIRIEC's history and sounds the death knell on the Glorious Thirty (1945-1975) in the association.

7. Crisis years and Guy Quaden's travaux

The 1970s crisis, which combines unemployment and inflation for the first time, has a negative impact on the collective economy: 'neo-liberalism' challenges the role of the State in orienting and regulating the economy. Private sector management methods aimed at increasing performance and reducing costs gradually assert themselves in the public sector. Moreover, as the consumer society settles in, the consumer cooperative sector starts to decline, as it is unable to withstand the competition from private groups. At the time, CIRIEC loses a significant number of its members. At the same time, some European public enterprises forsake CIRIEC for the European Centre for Public Enterprises (CEEP)²², whose role in lobbying the European institutions they appreciate.



Guy Quaden at the 16th International Congress of CIRIEC - Brussels, 1986 (CIRIEC collection)

²² CEEP gone through many name changes in the course of its history. Its latest designation «European Centre of Employers and Enterprises providing Public Services and Services of General Interest» was replaced by the acronym SGI Europe in December 2020.

In 1974, the *Annals* and CIRIEC swap the notion of 'collective economy' in the French title for 'public, social and cooperative economy'. This purely formal name change is pragmatic and evidence for CIRIEC's failure to generalise the use of the expression 'collective economy' that it has tried to propagate among economists, sociologists and political scientists for half a century. One of the reasons for this failure is the frequent confusion of the expression with 'collectivist economy', which has a negative connotation for some, since it is associated with the authoritarian Soviet economic system²³. The equally formal change in the wording of the purpose of CIRIEC in the 1974 statutes aims at taking into account the evolution in economic terminology²⁴.



In the foreground, Yvonne Gélard seated in front of Suzy Lhonneux and Germaine Calame, during a post-congress cruise - Athens, 1978 (CIRIEC collection)

of President and Director of the International Centre. He is succeeded in 1980 by Anton E. Rauter, professor at the Vienna Wirtschaftsuniversität [University of Economics and Business], senior leader of the Austrian cooperative movement (Director of Konsum) and former member of the Central Committee of the International Cooperative Alliance (ICA), who will hold this position for 14 years.

²³ Paul Lambert «Autre nom, même contenu [Other name, same content]», *Annals of public, social and cooperative economy*, 1974, vol. 62, n°1, p.3-5.

²⁴ The notion of organised economy disappears, while the expressions «régie publique» [public utility agencies] and «système des plans» [plan-based system] are replaced by «public sector» and «plans» respectively (CIRIEC Statutes, published in the *Moniteur belge* [Belgian Official Journal], on 31 December 1974, p. 4433). The reference to planning disappears in 2006, as it has become obsolete (CIRIEC archives, copy to be published in the annexes of the Belgian Official Journal after filing the deed with the Registry, 14 April 2006).

8. Scientific reinforcement of CIRIEC

Among the challenges before the young director, there is the need to redress the financial situation of the *Annals*. Since the end of the 1950s, the review has suffered from a structural deficit, a situation still aggravated by the gradual erosion of its readership from 1965 onward²⁵. A number of measures are taken to attempt to broaden the circulation of the review and above all reduce its costs. In 1981, it is decided to abandon systematic translation: the three editions are maintained, but henceforth, the articles are published in their original language with a summary translated in the two other languages, while better-selling thematic issues multiply. Still, the International Council will need another few years to take a final decision on the form and content of the review.

On the sidelines of the Athens Congress, the decision is made to relaunch a Scientific Commission. Placed under the chairmanship of Theo Thiemeyer, professor at the University of Bochum (Germany), its purpose is to provide an opinion on the content of the *Annals*, CIRIEC's research and congresses²⁶. Two meetings are held in 1979 (in Frankfurt in May and Liège in October). Representatives from Austria, Belgium, France, Germany, Greece and Italy examine the topic «Control and participation in public and cooperative enterprises». After that, the commission seems to slide into a state of lethargy until 1984.

The more scientific approach initiated by the International Centre is further reinforced symbolically by the move of its secretariat to the new buildings of the Faculty of Law and Economy of the University of Liège in 1981, on the Sart Tilman University Campus. CIRIEC also participates in a series of research projects and events. For instance, in cooperation with Professor Quaden's Economic Policy Department at the University of Liège, it organises a conference entitled «State and Steel in Europe» (Liège, 18-20 September 1980) and, in cooperation with Pierre Pestieau, professor of economics at the University of Liège, an International Symposium on the study of performance criteria for public enterprises (*Comparative Project on European Public Enterprises*) in 1985²⁷. In the same year, it is also involved in the international social economy conference of the International Association for the Economics of Self-Management (IAFSM) convened in Liège by a young assistant, Jacques Defourny.

²⁵ The three editions (French, English and German) decline from 2099 total subscriptions in 1965 to 1031 twenty years later. (Éric Geerkens, *op. cit.*, p. 441 et 451). It should be noted that at the initiative of professor F. Van Bocxlaer of the economics faculty of the University of Antwerp, a Dutch edition of the *Annals* is published between 1973 and 1977, with the aim of raising the interest in CIRIEC in the north of Belgium. Four issues are published with Dutch summaries of some articles. The initiative is abandoned after Paul Lambert's death.

²⁶ CIRIEC archives, Box «CIRIEC Scientific Commission 1978-1987», Folder «October 1978 - October 1981», New International Scientific Commission of CIRIEC, April 1978.

²⁷ CIRIEC archives, Binder RA 1984-1993, Activity Report 1985, p. 3.



14th International Congress of CIRIEC - Vienna, 1982
(CIRIEC collection)

Quaden's watch, three new sections are set up: Portugal (1980), Japan (1985) and Spain (1986).

For the very first time, the 13th International Congress is organised in Lisbon in 1980 even before the official founding of a Portuguese section²⁸. Two years later, Vienna hosts the event for the third time. The theme of the 1984 Congress convened in Florence in April is «Development or stagnation: public and cooperative intervention in the national economy». It gathers a record number of



Programme of the 16th International Congress of CIRIEC - Brussels, 1986
(CIRIEC collection)

participants (some 1200, including 850 delegates, from 42 countries)²⁹. In its stride, a new scientific commission is set up. Once again chaired by Theo Thiemeyer, it is composed of members of various national sections and first addresses the public economy and the privatisation of public enterprises as a priority angle of approach. This is a particularly worrying topical issue, as the disastrous consequences of Margaret Thatcher's policy against British public services start to become visible and as other European states, gradually persuaded by the Iron Lady's slogan «There is no alternative», embark on painful austerity policies. Soon, the scientific commission sets up a working group on the social and cooperative economy, chaired by Jacques Defourny.

The 16th International Congress, again organised by the Belgian section in 1986, but this time in Brussels, examines the «Financing of the

²⁸ It will be at the end of the Congress.

²⁹ E. Sinigaglia, «XV Congresso Ciriec internazionale di Firenze (15-18 aprile 1984)», *Economia Pubblica*, 1984, n°6, p. 324.

public, social and cooperative economy». It enjoys the prestigious patronage and presence of King Baudouin Ist.

The last congress in the 1980s takes place in Bordeaux in September 1988 on the topic «Mixed economy systems in modern economies». It proves to be decisive for the internal organisation of CIRIEC and its scientific orientation, as we shall see in the next chapter.

CHAPTER II: MULTIPLICATION OF SCIENTIFIC ACTIVITIES (1988-1996)

1. Overall economic context

1.1. Opening of Eastern European countries to the capitalist economy and constitution of the European Single Market



Berlin and Maastricht are two cities whose names are evocative of the significant changes in the European economic context from the late 1980s to the mid-1990s. The fall of the Berlin Wall on 9 November 1989 and the subsequent dislocation of the Soviet Bloc prompt the so-called Eastern European countries to gradually abandon the planned economy for the market economy. This economic restructuring takes place with the support of the European Union via its Assistance Programme for countries in central and eastern Europe (PHARE), a pre-accession instrument for these countries³⁰. A few years later, all eyes are turned to a town in Dutch Limbourg. With the Maastricht Treaty, signed on 7 February 1992 (and entering into force on 1 November 1993), the Single Market, envisaged right from the inception of the European Community in 1957, becomes a reality. Services, goods, capital and persons can now move freely between member states, while a Economic and Monetary Union (EMU) is set up alongside.

One year later, the World Trade Organisation (WTO) uses the revision of the General Agreement on Trade and Tariffs (GATT) to negotiate a specific agreement on services (GATS - General Agreement on Trade in Services). Despite considerable opposition from anti-globalisation and trade-union circles, services end up being included in trade agreements. This decision is to have profound repercussions, as it does not only open sectors such as railway transport and telecommunications to competition, but also education, health or basic social protection, sectors where States often have a monopoly. These global agreements will also have deep and irreversible effects on European legislation in the field of services of general (economic) interest.

These events further accentuate the globalisation of economic exchanges and the interdependence of national economies, resulting in increased competition and the predominance of a market rationale at the expense of the general interest.

³⁰ Hungary and Poland apply for accession in spring 1994. They are followed by Lithuania, Latvia, Estonia, Slovakia, Bulgaria and Romania in 1995, and by Czechia in 1996.

1.2. Crisis of the public sector and rise of the social economy

In the course of the 1990s, the public economy is hit by the full force of the alignment of national economic policies with neo-liberal ideas. The process of privatisation, after a brief lull in the late 1980s, surges again with renewed vigour. The acceleration of globalisation causes the destabilisation of States and their regulatory role at economic and social level. The European Union's intention to eliminate «technical, legal and bureaucratic obstacles» hindering free trade and competition between companies further reinforces the phenomenon. The EU's policy to limit as much as possible the intervention of the State in the economy and the regulations implemented in the field of public procurement result in the (at least partial) liberalisation of certain sectors that used to be State monopolies (post, transport, telecoms, etc.) and therefore in a weakening of the public economy in its member states. Between 1982 and 1995, in the wake of a wave of privatisations, the share of public enterprises in overall European production drops from 17 % to 11 %³¹. At the same time, public services are confronted with increased expectations from consumers (more flexibility, efficiency, etc.) and therefore with a challenge to their very existence. The wave of privatisations also hits the countries of eastern and central Europe with full force, after the collapse of their collectivist and planned economic system, prompting some economists to speak of an «East wind relaying the West wind»³².

The same applies to the cooperative movements in Europe, which, following on from a decline initiated at the dawn of the 1960s, suffer a serious crisis in the 1980s-1990s. It is marked by the disappearance of whole networks (particularly those linked to consumer cooperatives) and the prospect of unprecedented competition for the remaining ones. At the same time, Asian and Latin-American cooperatives, which rely on strong local dynamics, assert their presence in certain sectors (agri-food, housing, etc.)³³. In March 1993, on the occasion of the centenary of the International Cooperative Alliance³⁴, the United Nations adopt a resolution recognising the role played by cooperatives in social policy and proclaim the first Saturday in July the International Day of Cooperatives. In general, these decades witness a rise of the social economy. This is confirmed, on the one hand, by the development of the associative sector, both in Western countries and (timidly) in former Soviet Bloc countries (where it had until then been impeded by State control), and on the other hand, the assertion of the very concept of social

economy³⁵ and finally the increased acknowledgement of this alternative form of economy by the European institutions. On the initiative of Commission President Jacques Delors, a unit dedicated to the social economy is set up in 1989 within Directorate-General XXIII (Enterprise and Industry)³⁶. This is not without influence on the development of scientific activities in CIRIEC International, as it provides CIRIEC, through European research projects, with the financial means to sustain the evolution of its scientific bodies and the creation of a scientific commission on the 'Social and Cooperative Economy'.

2. A growing network

The quantity and quality of the scientific work produced by the International Centre is highly dependent on the network it can rely on. Indeed, its credibility depends in part on the representativeness of this network, within which the national sections occupy a key place. It is therefore a major concern for CIRIEC to maintain and, above all, to intensify its contacts with existing sections and to encourage the creation of new ones (particularly through the scientific commissions and international research work).

In the mid-1990s, aware that the lack of communication between its sections is detrimental to the quality of its network, CIRIEC International decides to re-launch the publication of an internal information bulletin (it had discontinued in 1968). Drafted in three languages (French, English and German), it aims at improving the dissemination of information within CIRIEC, includes a calendar of activities, reports of events, disseminates initiatives and latest news from various national sections.

The national sections

At the beginning of the 1990s, CIRIEC International is present on three continents (Europe, Asia, America) and has official national sections in fourteen countries: Austria, Belgium, Canada, France, Germany, Greece, India, Israel, Italy, Japan, Portugal, Spain and Yugoslavia. However, this is merely a theoretical situation,

35 «The social economy is composed of economic activities carried out by enterprises, mainly cooperatives, mutual societies and associations whose ethics are based on the following principles: 1) the purpose is service to members or the collectivity instead of profit; 2) management autonomy; 3) democratic decision process; 4) primacy of people and labour over capital in income distribution» (1990 definition of the Social Economy Committee of Wallonia, quoted from: Jacques Defourny, «The social economy sector in Belgium» in Jacques Defourny & José Luis Monzón Campos (dir.), *Economie Sociale - The Third Sector*, Brussels-Paris, De Boeck, 1992, p. 225-256.

36 Dissolved in 1997, this unit will be replaced in 2000 by the unit 'Crafts, small enterprises, cooperatives and mutuals' under the same Directorate-General. Denis Stokkink & Pierre Perard, «L'économie sociale et solidaire en Europe» [Social and solidarity economy in Europe], Analytical notes, May 2016, Coll. *Pour la solidarité* – PLS, p. 7 [consulted online: https://www.associations.gouv.fr/IMG/pdf/ess_en_europe_2016.pdf].

31 «Austrian section of CIRIEC. Activity report. 2000-2002», in Activity Reports. *International Centre and National Sections*, Liège, CIRIEC, October 2002, p. 49.

32 Bernard Thiry, «L'entreprise publique dans l'Union européenne» [Public enterprise in the European Union], *Annals Of Public, Social and Cooperative Economics*, 1994, Vol. 65, n°3, p. 429.

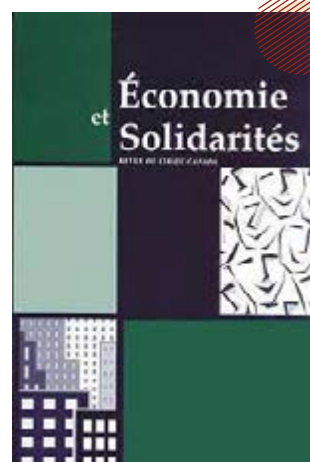
33 Alain-G. Gagnon & Jean-Pierre Girard (dir.), *Le mouvement coopératif au cœur du XXI^e siècle [The cooperative movement at the heart of the 21st century]*, Sainte-Foy, Presses de l'université du Québec, 2001, p. 8-9.

34 United Nations, Resolution adopted by the General Assembly, 22 March 1993 – A/RES/47/90 (consulted online: <https://documents-dds-ny.un.org/doc/UNDOC/GEN/N93/168/80/IMG/N9316880.pdf?OpenElement>).

as some sections only exist on paper: they have either slipped into lethargy for a number of years, pay no contribution or do not participate in CIRIEC's activities, all *sine qua non* prerequisites to be recognised as sections³⁷.

This for instance the case of the Indian and Israeli sections, which were dissolved in 1993 for lack of response to attempts at reviving them, thereby reducing CIRIEC's footprint in Asia. Indeed, the financial difficulties of the International Centre force the director to adopt a stricter position with regard to the payment of contributions, which constitute its main source of income. Contacts with European sections (Greece, Portugal) and on the American continent (Canada, Argentina) prove to be more productive. In 1991, the rapprochement between CIRIEC's and CEEP's Greek sections on the occasion of the organisation of an international colloquium in Athens points to a reinforcement of its activities. As to the Portuguese section, it significantly develops its activities in the field of the social economy, as we are going to see later.

At the end of the 1980s, the *Interdisciplinary Centre for Research, Information and Education on Cooperatives* (the successor of the former Canadian section set up in 1966 by Professors Lerner and Davidovic) re-establishes contact with CIRIEC after a long period of introversion. Admittedly, this isolation results from its physical remoteness, but it is mostly linked to the fact that CIRIEC-Canada concentrated only on Quebec and that it now focuses exclusively on the cooperative sector (very prevalent in Canada and absent from the work of CIRIEC's scientific commission for two decades). The Canadian section engages in the work of the new scientific commissions and in the editorial board of the *Annals* and, in 1991, meets the wishes formulated by the International Board to take greater account of the general interest economy as a whole. Consequently, under the presidency of Benoît Lévesque, CIRIEC-Canada opens its statutes to the social and public economy. As a sign of its rapprochement with the International Centre, the first meeting of the International Board outside Europe is organised in Montreal on 3 October 1994. In 1996, the section changes its name to *Interdisciplinary Centre for Research and Information on Collective Enterprises*. Similarly, this new orientation manifests itself from 1996 onwards in the new title of its review (*Économie et solidarités* instead of *Coopératives et Développement*) and of the colloquium it organises every year alongside the



CIRIEC-Canada Journal
(CIRIEC collection)

congress of the French-Canadian Association for the Advancement of Science (ACFAS)³⁸.

Very weakened by financial problems (and the loss of its premises), the Argentinian section (the first to be set up outside Europe in 1966, together with Canada), owes its survival to *Alianza del Mutualismo de America*, which accepts to host it. Thanks to the determination of its president, Arturo Octavio Ravina, the *Instituto Argentino de Investigaciones de Economía Social* (IAIES) quickly manages to re-launch the publication of its review *Cuadernos de Economía Social*. In order to find new members (particularly social economy enterprises and trade unions), it organises conferences and sets out to create subsidiaries within the country.

While some contacts are reinforced in order to consolidate the links with certain sections, others aim at setting up new sections: a Yugoslav section is set up in 1989. When Slovenia declares its independence two years later, the International Board gives its preliminary agreement on the substitution of the Yugoslav section with a Slovenian section, the official accession being conditional on the recognition of the new state at international level. This will take place in February 1992³⁹.

A few months later, the General Assembly held in conjunction with the Valencia congress (1992) endorses the official creation of a Swedish section founded by two cooperative research centres: the Swedish Cooperative Research and Development Institute (KOOPI) and the Swedish Society for Cooperative Studies. Chaired since 1993 by Peter Normark (assistant professor at the Stockholm School of Economics), the young section is quick to develop a flurry of activities in the form of conferences and seminars and, in February of the following year, hosts the meeting of CIRIEC's International Board for the first time. On 28 September 1994, it is stricken by tragedy, when members of its team (including its secretary general and delegate of Swedish cooperatives Alf Carlsson and Rut Hammarström, board member of the section) and a number of representatives of member enterprises of CIRIEC-Sweden perish in the sinking of the ferry MS Estonia operating between Tallinn and Stockholm, on board of which a seminar on peace and security of the Baltic region was being held. After internal re-organisation in 1996, the section is renamed *Swedish Cooperative Network*, with Per-Olof Jönsson (Cooperative Institute) as president and Peter Normark as scientific secretary.

As in the past, there are ongoing contacts with associations in the United Kingdom (Institute for the Social Economy), the Netherlands (School of Management of Non-Profit and Public Sector Organizations⁴⁰ of Tilburg University), Denmark

³⁷ It should be noted that these two requirements are quite restrictive in financial terms for smaller sections and those outside Europe: although - as we have seen - a 'solidarity' system exists, with a proportional membership contribution, regular participation in meetings can be difficult, since the sections need to cover travel and accommodation expenses themselves.

³⁸ Initially entitled *Colloquium of comparative studies*, it is renamed *Colloquium on the Social, Public and Cooperative Economy* in 1996.

³⁹ CIRIEC archives, Minutes of the Board meeting held in Munich on 21 February 1992, p. 2.

⁴⁰ School Beleidsvoering in Non-Profit- en Overheidsorganisaties.

(NALAD - National Association of Local Authorities in Denmark)⁴¹ and even in the USA (Florida International University). Other avenues are also explored with a view to setting up sections in Turkey, Bulgaria, Slovakia and North Africa. Despite the genuine interest in CIRIEC expressed by these countries, the projects do not materialise, most often for lack of adequate financial resources or sufficiently stable structures to constitute the foundations of the new sections.

At the beginning of the 1990s, CIRIEC actually relies on eight main sections (Austria, Belgium, Canada, France, Germany, Italy, Japan and Spain).

3. Turning point in the 1990s: new operating mode and new challenges

CIRIEC International starts the 1990s faced with three major challenges: manage the third change in leadership in its history; manage the incipient reorganisation of its internal and scientific operation; and face a delicate financial situation further weakened by this reorganisation.

3.1. Evolution of internal structures

3.1.1. Governance bodies

On 22 September 1988, the statutes of the International Centre are amended in order to extend the executive committee (henceforth called Praesidium): it is officially composed of the president, vice-presidents (three instead of two) and three members elected by the Board⁴². The objective is to allow more national sections (provided they have paid their membership contributions) to sit on the governing body and thereby influence the decisions of the International Centre. While previously five sections were represented in the Praesidium (Austria, Belgium, France, Germany and Italy), with the arrival of Spain and Japan, they are now seven to preside over CIRIEC's destiny. This new mode of representation proves to be very positive, as it reinforces the links between sections and allows the involvement of newly created or 're-activated' sections: this will for instance be the case of the Swedish and Canadian sections, which in 1994, i.e. just two or three years after their (re-)establishment, have a member sitting on the Praesidium and host a meeting of the International Board, respectively in February and October of the same year (incidentally, the meeting in Montreal in October 1994 is the first one organised outside the European continent).

The will to involve the sections more and to foster greater solidarity between the sections is also reflected in the request expressed as early as 1986 by some members of the International Board (particularly the Belgian Roger Ramaekers)

⁴¹ Kommunernes Landsforening.

⁴² CIRIEC archives, Minutes of the General Assembly of CIRIEC. Bordeaux, 22 September 1988, p. 9-10.



Anton Rauter at the 14th International Congress of CIRIEC - Vienna, 1982 (CIRIEC collection)

to introduce a rotating presidency of the International Centre⁴³. Since 1980, the presidency has indeed been held without interruption by Anton Rauter, director of Konsum and professor at the Vienna Wirtschaftsuniversität (University of Economics and Business). A rotation system, according to the proponents of this option, would constitute a motivational argument for the other sections and, besides, is common practice in international organisations. Still, the request is not followed by the International Board, which proposes to re-elect Rauter as president at the General Assembly in 1988. However, and the end of the Austrian's fourth consecutive mandate, the debate intensifies and tensions rise. In February 1992, while the Board unanimously agrees on rotation principle (now applied to all positions, i.e. in the Praesidium, but also the Scientific Council and Scientific Commissions), the Austrian section reacts negatively upon realising that this principle is to be applied as of the next General Assembly. Indeed, CIRIEC-Austria (*Verband für öffentliche und gemeinwirtschaftliche Wirtschaft - VöGW*) celebrates its 50th anniversary that same year and has volunteered to organise the 1994 congress. It considers it a bad sign to yield the presidency before holding these prestigious events. It threatens not to host the upcoming congress and henceforth to pay only the regular membership fee without the voluntary contribution it was wont to grant the International Centre for many years. Finally, a compromise is accepted at the



Fritz Gautier at the 50th anniversary of CIRIEC International - Brussels, 1997 (CIRIEC collection)

next Board meeting held in conjunction with the congress in Valencia (Spain) in June 1992: Anton Rauter is to serve a last two-year mandate at the end of which the rotation system will become effective. In return, the Austrian section refrains from going through with its 'threats'.

At the General Assembly of 10 May 1994 held alongside the 20th international congress in Graz (Austria), the German Fritz Gautier, director general of the municipal enterprises of the city of Cologne, is elected the new president for a two-year mandate. He is flanked by four vice-presidents: José Luis Monzón (president of CIRIEC-Spain), Massimo Pinchera (member of the secretariat of the Italian section), Guy Quaden (director of the Belgian National Bank) and Heinz Vögler (president of the Bundesarbeiterkammer in Vienna). Three other members representing Canada,

⁴³ CIRIEC archives, Minutes of the General Assembly held in Antwerp on 12 June 1986, p. 8.

Japan and Sweden complete the executive committee. A very similar team is re-elected for two years at the General Assembly in Lisbon on 22 May 1996: José Luis Monzón resigns from his position of vice-president in favour of Jacques Fournier⁴⁴, State councillor and president of CIRIEC-France, and returns to the 'pool' of members. For the preparation of the Lisbon congress, the Praesidium is extended (in 1995-1996) to include a representative of the Portuguese section.

3.1.2. Establishment of the International Scientific Council

In June 1988, while he is getting ready to take up his new position as director of the Belgian National Bank, Guy Quaden proposes to the Board to revise the scientific structure of CIRIEC. His intention is to remediate some shortcomings observed in the functioning of the CIRIEC's Scientific Commission. The latter had indeed proved unable to fulfil the assignment it had been given to conduct research on investments in public enterprises, forcing CIRIEC to renounce the organisation of a colloquium on this topic (planned in Mannheim (Germany) in spring). The idea is to turn the commission into an international 'coordination board' tasked with coordinating CIRIEC's scientific work (and ensure its continuity). The idea is not new: first formulated in 1981⁴⁵, it had never been implemented. Composed of representatives from various national sections (appointed for a period of three years), the International Scientific Council (ISC) proposes research topics that will be entrusted to two scientific commissions (one dedicated to public enterprises, the other to the social and cooperative economy), whose presidents it appoints (from its own ranks) and whose members it selects (together with the latter). These are specialists picked in accordance with the topics chosen and after consultation with the national sections. The two commissions work autonomously (they can set up internal working groups to conduct additional specialised research), but need to keep the president of the Scientific Council and the director of CIRIEC informed of their activities.

The ICS is also in charge of the strategic coordination of the research topics between CIRIEC's two fields of interest: the public economy and the social economy. It is also responsible for maintaining the balance between these two fields of research and serves as a link between the two commissions. Using 'general interest' as a common element, it strives to build a bridge between them by prompting reflections on common points, problems and interests that both sectors share on a practical and theoretical level. Despite this intention and for a number of years, the two commissions prefer a sectoral instead of a transversal approach, i.e. the study of the same topic in all components of the economy (public, social and cooperative).

⁴⁴ Jacques Fournier is also the former deputy Chief of Staff of the French President, former president of *Gaz de France*, former president of the French national railway company (SNCF) and former president of the European Centre of Employers and Enterprises providing Public Services (CEEP).

⁴⁵ CIRIEC archives, Box «Scientific Commissions 1978-1987», folder «October 1978 - October 1981», Excerpt of a letter of 26 Feb 1981 from Dr. Kliemt to Prof. Rauter concerning the establishment of a standing scientific advisory board in CIRIEC.

As in the past, the first commission focuses on public enterprises. It starts a reflection on the future of public enterprises by 1993 (date of the implementation of the Single Market). The second commission is the result of requests from some of the national sections and is intended to address questions pertaining to the social and cooperative economy⁴⁶. Right from the start, it sets up two working groups, both coordinated by Jacques Defourny, supported by Christine Dussart, who is in charge of the secretariat of the 'Social and Cooperative Economy' commission: the first working group sets out (from 1989 to 1992) to «identify the social economy», which is attracting growing interest at the time; the other is assigned (from 1989 to 1995) the «cost-benefit analysis of cooperative principles», thereby answering the needs of this sector in a deep crisis. Right from the start, the commissions and working groups appear to have served both as a kind of international observatory by providing detailed scientific analysis on the reality and evolution of economic sectors pursuing general interest, and as a meeting place and venue for privileged reflection to promote these 'alternatives' to the capitalist economy, thereby contributing to the development of the public, social and cooperative economy by providing decision-makers and particularly the European Union with scientific data and recommendations to help them in their decisions or in the drafting of legislation for these sectors.

The International Scientific Council holds its first official meeting on 26 April 1991 in Brussels, under the presidency of Theo Thiemeyer, who had chaired the 'old formula' Scientific Commission until then. Professor José Luis Monzón Campos (University of Valencia, Spain) chairs the 'Social and Cooperative Economy' commission for more than 10 years (until 2002); Lionel Monnier (University of Caen, France) chairs the scientific commission on 'Public Enterprises' until 1992, when he succeeds Theo Thiemeyer (who had died in the meantime) at the head of the International Scientific Council. The German Helmut Cox (University of Duisburg) succeeds him (also until 2002) as president of the commission on 'Public Enterprises'.

The qualitative and quantitative leap resulting from the implementation of this new scientific structure is rapidly felt in CIRIEC's activities, as we are going to see later on.

3.2. The team grows

The third change in leadership in the history of CIRIEC International takes place in 1990. In 1988, Guy Quaden is appointed to the management board of the Belgian National Bank. In order to relieve him of some of his work in CIRIEC, his university co-worker Bernard Thiry is appointed deputy director⁴⁷, then director two years later⁴⁸; however, Guy Quaden remains the vice-president of the two organisations

⁴⁶ CIRIEC Archives, Minutes of the Board meeting held in Brussels on 3 June 1988, p. 3-4.

⁴⁷ CIRIEC archives, Minutes of the Board meeting held in Vienna on 10 December 1988, p. 3

⁴⁸ CIRIEC archives, Minutes of the General Assembly. Portorož, 15 June 1990, [p. 9].

(CIRIEC international and the Belgian section). A specialist in labour and transport economy, Bernard Thiry has just been appointed professor of political economy at the University of Liège, following in the footsteps of Paul Lambert, who held this position for more than a quarter of a century since the late 1950s, and had presided over the International Centre's destiny (1957-1977).

To support him, Bernard Thiry has a team of four dynamic and dedicated employees who had worked for a number of years in CIRIEC-Belgium: Yvonne Gélard, Paul Lambert's and later Guy Quaden's right arm; Suzy Lhonneux, in charge of the accounting of the two associations and head of the secretariat of the Belgian section; Christine Dussart, who is to become the editorial secretary of the *Annals of Public, Social and Cooperative Economy* and secretary of the new 'Social and Cooperative Economy' commission and Marilyn Garcia in charge of the secretariat of CIRIEC International. The arrival of a young director in a team with three other co-workers in their thirties like him creates a new dynamic in the International Centre and in its Belgian section.

The reorganisation of the scientific bodies ushered in by Guy Quaden quickly results in an increase in CIRIEC's scientific activity and, consequently, a significant increase in its workload. The team is therefore gradually strengthened with the arrival of Hélène Lopez and Carmela De Cicco, respectively a documentalist and secretary of the Belgian section, hired to develop the documentation centre. In 1990, Barbara Sak, a graduate in economics from the University of Liège, is hired; she quickly becomes Bernard Thiry's right arm. Finally, in 1995, a young Dutch-speaker, Gunther Vranken, joins the team for various research and the development of contacts in Flanders.

Shortly before, in May of the same year, CIRIEC had moved: it had left the building (B31) it had occupied since 1981 in the faculty of Economy, Management and Social Sciences to move to another building on the Sart Tilman campus (B33 aka the 'tri-faculty' building). The loss of a direct link to the faculty is made up for by significantly more space, which allows a.o. to organise and expand the documentation centre (confined to the same room as the secretariat until then).



Building B33 of the University of Liège

3.3. The financial challenge

Although CIRIEC International can count on a stable and professional team (partly provided by the Belgian section), its financial situation remains fragile. CIRIEC's main source of recurrent income is the contributions of the national sections composing it. In this respect, and in order not to exclude sections from economically weaker countries, a two-tier system of dues is applied: the weakest and most remote sections pay a minimum contribution that is half the amount of the strongest sections⁴⁹. In addition, a few financially better-off sections (e.g., Belgium, Germany, and Austria) pay additional contributions on a voluntary basis. Despite this relatively flexible *modus vivendi*, payment of dues remains a nagging problem and some sections are significantly behind in their payments, sometimes not paying their dues for several years. The problem is far from anecdotal. Indeed, at a meeting of the International Board in 1988, Guy Quaden states that if only the sections that have paid their dues were counted, CIRIEC would have only five (out of fourteen official sections at the time)⁵⁰. CIRIEC is quite lenient in its approach, and its priority is to broaden its influence at the international level.

The costs faced by the International Centre increase as the scientific activities within the commissions and working groups develop, involving costs for meetings, interpretation and translation, publication, etc. In order to reduce expenses, while reinforcing the scientific character and professionalism of the review, the Board decides in 1988 to transfer the publication of the *Annals* to a professional publisher (see below), but the impact on the finances remains limited at first, since the review reports an average yearly deficit of 260,000 Belgian francs between 1990 and 1996, (about €10,500 in 2021 prices)⁵¹.

This situation calls for a quick increase in revenues. These will take the form of subsidies obtained from various Belgian ministries and administrations. In addition to these subsidies, from 1992 onwards, a financial contribution (100,000 Belgian francs) is provided by the publishing house De Boeck to cover the meeting costs of the editorial bodies.

From 1992 onwards, an indexation principle is applied to the contributions: they are revalued when the price index in Belgium increases by 10%, i.e. in practice about every three to four years. To fund scientific work, it is decided to seek specific means by proposing to large public or social economy companies to carry out research on the issues that interest them. For more than 15 years, European funds are also regularly called upon, with CIRIEC developing a strategy

⁴⁹ From 1982 to 1992, the membership contribution amounts to 100 000 Belgian francs maximum (about €4 264 in 2021 prices) for the so-called 'weak' sections and to 200 000 Belgian francs for the financially better-off sections (CIRIEC Archives, Minutes of the Board meeting held in Milan on 2 October 1992, p. 5).

⁵⁰ CIRIEC archives, Minutes of the Board meeting held in Brussels on 3 June 1988, [p. 5].

⁵¹ Éric Geerkens, *op. cit.*, p. 410.

of responding to numerous calls for projects launched by the European Union. For example, in 1992-1993, no less than three scientific contracts were carried out at the European level: the first (financed by DG XXIII) aimed at setting up a network of research institutes and researchers in the social economy; the second at assisting Eurostat in drawing up a definition of public enterprise (with a view to developing harmonised European statistics on public enterprises); while the third consisted of an analysis carried out on behalf of the European Parliament of public service enterprises in nine EU countries (cf. below).

4. A multiplicity of scientific activities

The reorganisation of the scientific bodies produces a rapid development of CIRIEC's scientific activities, with research work carried out within the commissions and their working groups following one another on a regular basis, every two or three years. A twofold problem therefore arises: on the one hand, how to make these scientific contributions known and, on the other, how to ensure the financial sustainability of the research carried out? It should be remembered that the costs associated with the work of the commissions are borne by the participants themselves, who work on a voluntary basis, by the national sections they represent (as regards travel) and by CIRIEC International (as regards the secretariat, including translation and interpretation).



CIRIEC logo from the late 80's to the early 90's (CIRIEC collection)

4.1. International Congresses

The organisation of congresses, every other year, has been one of the major scientific activities of CIRIEC International since its creation. The choice of the organising section, the general theme, the scientific speakers and the political representatives or international institutions that contribute to the prestige of the event are the subject of lengthy discussions within the International Board, which takes great care to ensure that all the sections are represented and that there is a certain balance between the public economy and the social and cooperative economy, but also between practitioners and theoreticians. The congresses are intended for a diverse public made up of scientists, heads of public or social enterprises (cooperatives, associations, mutual societies, etc.), but also many representatives from trade unions and political circles. This meeting of two very different worlds, the realms of research and field experience, challenge CIRIEC to ask itself each time how to reconcile the different interests of the audiences its congresses are aimed at.



Bernard Thiry, Anton Rauter, Rado Bohinc and the Mayor of Piran at the 18th International Congress of CIRIEC - Portoroz, Austria. In the mind of 1990 (CIRIEC collection)

Guy Quaden (director at the time), this choice meets CIRIEC's need to broaden its audience. It is also an opportunity to open up to an Eastern European country undergoing major economic transformation. In this respect, the theme of the congress proposed by the Yugoslavian section at the Board meeting of December 1988 is topical, since it concerns «the impact of the reforms underway in the East and West on the management of public, social and cooperative enterprises» and its intention is to examine the consequences of the Single European Market in terms of commercial relations with the countries of Eastern Europe⁵². As the terms East and West were considered too vague (both geographically and in terms of the economic structures existing in the countries they cover), a more generic title was finally chosen in the spring of 1989: *Public and social enterprises facing the international challenges of the 1990s*⁵³. In retrospect, it is rather funny to think that the Board had no idea at the time that the term 'challenges' was to apply to one of the greatest global political upheavals of the 20th century and a radical transformation of the economic landscape of half of Europe only a few months later. The congress ends on a very positive note. The young Yugoslavian section is strengthened (its official accession is announced at the Board meeting on 31 October 1989), since a year later it has managed to double its membership⁵⁴. Bernard Thiry officially becomes CIRIEC's fourth director during the General Assembly held in conjunction with the congress.

The 19th congress in Valencia (Spain) from 15 to 17 June 1992 deals with «Public, social and co-operative enterprises in the New Europe. Competition,

⁵² CIRIEC archives, Minutes of the Board meeting held in Vienna on 10 December 1988, p. 3-7.

⁵³ CIRIEC archives, Minutes of the Board meeting held in Salzburg on 24 April 1989, p. 3-6.

⁵⁴ CIRIEC archives, Minutes of the Board meeting held in Valencia on 22 September 1990, p. 5.

public missions and solidarity». Under the patronage of the King of Spain, it brings together some 700 participants from 23 countries and enjoys good media coverage. Karel Van Miert, European Commissioner for Transport, Consumer Policy, Credit and Investments, addresses the opening session. There are specific parallel sessions on the social economy and the public economy, as well as an adversarial debate with the European Commission's DG Competition.



Tribune of honor of the 19th International Congress of CIRIEC - Valencia, 1992 (CIRIEC collection)

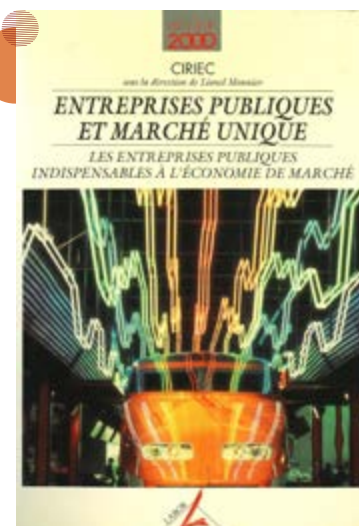
One of the pillars of CIRIEC, the Austrian section, is responsible for organising the 20th International Congress (in Graz from 9 to 11 May 1994). 540 participants representing 25 countries meet on the topic of «Future strategies for the mixed economy: cooperation not confrontation». The aim is to stimulate reflection on the consideration of the general interest in a mixed economy system and to highlight the importance of developing strategies for cooperation between private, public and social economies. In order to establish a dialogue between scientists and practitioners, the organisers introduce a new formula: the organisation, alongside the traditional opening and closing sessions, of workshops confronting theory and practice around four sub-topics (environment, energy and technology, solidarity organisations and transnational cooperation models).

In 1996, the CIRIEC congress meets for the second time on the banks of the Tagus, in Lisbon, after a first edition sixteen years earlier. The organisation of this event testifies to the renewed dynamism of the Portuguese section after a slack period at the end of the 1980s. When it was created in 1980, the section was more oriented towards the public economy and was weakened by the many denationalisations that Portugal experienced. Since then, it had turned towards the social economy and in 1990 is the driving force behind a 1993 European Forum on mutualism and the social economy. The theme chosen for the Lisbon congress, «Towards what economic and social cohesion?» is intended to be concrete and to avoid Eurocentrism: it aims to focus on the problem of employment and the ways in which the social economy can help to solve it. With a view to addressing the trade union leaders, politicians and business leaders, who make up the majority of its audience, the congress gives priority to case studies and concrete achievements. Finally, a new formula is tried out: rather than distinguishing between plenary sessions and parallel sessions, it is decided to set up sessions on transversal topics. 600 participants from 20 countries take part in the event, which boasts a number of political figures among the speakers

(including Prime Minister António Guterres and Elio di Rupo, Belgian Deputy Prime Minister and Minister for the Economy and Telecommunications), the Director of the International Labour Office (the Belgian Michel Hansenne) and the Director General of the European Commission's DG XXIII (the German Heinrich von Moltke).

4.2. Research Activities

4.2.1. Public Economy Research



Headed since June 1992 by Helmut Cox (professor at the University of Duisburg, Germany) and bringing together some thirty economists and legal experts from nine European countries (Austria, Belgium, France, Germany, Greece, Italy, the Netherlands, Slovenia and Spain), joined later by Japan, the commission on 'Public Enterprises' publishes the results of its research work begun in 1988 in the book *Public Enterprises and the Single Market*⁵⁵. It studies the negative impact that privatisation policies, competition and State budgetary constraints have on the existence and role of public enterprises and recalls their crucial role in the market economy. Co-organised by the Belgian section, a colloquium on «The future of public telecommunications companies in Europe 1993» is held in Liège at the end of March 1990 with a view to presenting and

discussing the first sectoral results; a report is produced⁵⁶.

In the following years, the research activities of the commission on 'Public Enterprises' show frequent interaction with the European authorities, as the members of the commission adopt a critical attitude towards the competition of public services on which the building of Europe is based.

Partly financed by the European Community (Directorate-General VII - Transport), the new research in which the commission on Public Enterprises is involved, «Prospective analysis of the evolution of the missions and structures

⁵⁵ Lionel Monnier (dir.), *Entreprises publiques et Marché unique. Les entreprises publiques indispensables à l'économie de marché* [Public enterprises and Single Market. Public enterprises essential to the market economy], Brussels, Éditions Labor, Coll. *Économie 2000*, 1992. The book is published in German two years later: Lionel Monnier (dir.), *Perspektive der öffentlichen Wirtschaft in Europa: Die Aufgaben der öffentlichen Unternehmen im Binnenmarkt* [The Public Sector Perspective in Europe: The Role of Public Enterprises in the Single Market], Baden-Baden, Nomos, Schriften zur öffentlichen Verwaltung und öffentlichen Wirtschaft [Writings on public administration and public economics], Vol. 90, 1994.

⁵⁶ *Le devenir des entreprises publiques de télécommunication dans l'Europe 1993* [The future of public telecommunications companies in Europe 1993]. Minutes of the CIRIEC-IFIG colloquium, 30 March 1990, Liège, CIRIEC, 1991, 118 p.

of public enterprises in the perspective of the Single European Market of 1993», is conducted in collaboration with the Trans European Policy Studies Association (TEPSA). It reveals the need to implement policies that take into account the notion of the Community general interest and results in the publication (in French, then in German) in 1995-1996 of a book entitled *Les entreprises publiques dans l'Union européenne : entre concurrence et intérêt général*⁵⁷.

In 1994, the commission is involved in various European projects. As mentioned earlier, as part of a study it is conducting on public service missions, the European Parliament's Directorate-General for Research commissions a series of reports describing the environment (economic, legal, institutional) in which public service companies operate in nine EU countries. The aim is to inform MEPs about the consequences of opening up competition without safeguards to guarantee the essential missions of public services.

In the same spirit, the CIRIEC commission provides scientific support for a seminar on the economic approach to public services in the European Union. Organised at the request of the European Centre of Enterprises with Public Participation (CEEP), this event, which takes place in Cologne, Germany, on 24 October 1994, is part of the European Public Services Charter project initiated by the President of the European Commission, Jacques Delors⁵⁸. The seminar concludes that the organisation and management of public services in the various countries face the same problems. It also reveals the great diversity of national conceptions of public service. Therefore, on 19 March 1996, a Franco-German seminar is again held in Cologne, in order to better understand public service concepts and realities in these two countries. This event is organised by the two CIRIEC sections concerned and by the International Centre, in collaboration with the European Liaison Committee on Services of General Interest (CELSIG).

Six members of the 'Public Enterprises' commission, Belgian and French academics (economists and jurists), engage in a 'critique of the Community rationale' as part of a research agreement signed with Électricité de France (EdF).

57 Bernard Thiry & Jacques Vandamme (dir.), *Les entreprises publiques dans l'Union européenne : entre concurrence et intérêt général* [Public enterprises in the European Union: between competition and general interest], Paris, Éditions A. Pedone, 1995, 174 p.; Helmut Cox, *Öffentliche Dienstleistungen in der Europäischen Union. Zum Spannungsfeld zwischen Service Public und Wettbewerbsprinzip* [Public Services in the European Union. On the tension between 'Service public' and the competition principle], Baden-Baden, Nomos, Schriftenreihe der Gesellschaft für öffentliche Wirtschaft [Publication Series of the Society for Public Economics], Issue 40, 1996, 125 p.

58 CIRIEC archives, Minutes of the International Board meeting, 6 March 1995, Cologne, p. 5.



They study the reality of the 'dysfunctions' of the electricity sector identified by Europe and used as arguments in favour of the reorganisation of the electricity sector underway in the European Community.

In the same year, the commission takes up a new topic which is again in line with the spirit of resistance to the European Union's policy of opening up public services to competition and which addresses important issues: the study of public service missions within the framework of the regulations put in place in the European Union. The resulting book, published in 1997⁵⁹, examines in particular the issues of definition and interpretation of the concepts of public service and service of general interest. For more than a decade, these concepts will be the focal point of CIRIEC's research, with the aim of defining them, studying their financing, evaluation and regulation, and highlighting the diversity of the companies (public, private and mixed) that provide them.

4.2.2. Social and Cooperative Economy Research

Chaired by José Luis Monzón, supported by Christine Dussart, who acts as secretary, the 'Social and Cooperative Economy' commission has around twenty members: representatives of CIRIEC's national sections and external correspondents (for certain countries which do not have a section, such as the United Kingdom, for instance). As mentioned above, it supervises the work of the two working groups that have been set up within it, one focusing on the social economy and the other more specifically on the cooperative sector.

Set up in 1988 and coordinated by Jacques Defourny, a first working group «Identification and analysis of the social economy sector» works towards a better definition of the concept and knowledge of the field covered by this sector and results in the publication of a bilingual collective book in 1992. This major publication will greatly contribute to the recognition of this specific third sector (distinct from the public and private sectors) and its values (democracy, autonomy, service and not profit, priority to people and labour and not to capital)⁶⁰.

In parallel with this cross-cutting study and in accordance with the expectations of its members, the commission rapidly develops sectoral approaches within its working groups. Indeed, unlike the public economy, the social and cooperative economy comprises different realities and purposes: cooperatives and mutual societies are enterprises that pursue the interests of their members, whereas associations and foundations belong to the non-profit sector.

59 Helmut Cox (dir.), *Services publics, missions publiques et régulation dans l'Union européenne* [Public services, public missions and regulation in the European Union], Paris, Éditions A. Pedone, 1997, 209 p.

60 Jacques Defourny & José Luis Monzón Campos, *Économie sociale. Entre économie capitaliste et économie publique - The Third Sector. Cooperative, Mutual and Nonprofit Organizations*, Brussels-Paris, De Boeck, Coll. *Ouvertures économiques*, 1992, 459 p.

As early as 1988, a working group focusing on the cooperative sector is set up. Under the coordination of Jacques Defourny, and from 1990 onwards of Professor Zevi (University of Urbino, Italy), this group studies the principles and practices developed by cooperatives in terms of adaptation to the market and performance and highlights their advantages and disadvantages. It makes a comparative analysis of national legislations in this sector and the European Cooperative Statute. The work of this working group also results in a book *Cooperatives, Markets, Cooperative Principles*. Published in Spanish in 1994 on the occasion of a colloquium organised in Seville by CIRIEC-Spain and the International Cooperative Alliance (ICA), the book is subsequently published in French (in 1995) and English (in 1996)⁶¹. Its publication is the subject of a presentation seminar (in Paris in 1995), a formula which proves conclusive and which will subsequently be repeated sporadically.



In 1993, a new working group is set up to study the associative sector. It testifies to the emergence, at the academic level, of scientific interest in this sector and to the place it has attained within the social economy. On the basis of an analysis of services for the elderly and professional reintegration, the working group «Associations and the Social Economy», composed of thirty specialists from ten countries, attempts to identify the responses provided by associations to the employment crisis and the demise of the 'welfare state'. It results in a raft of publications (in Spanish, English and French, respectively in 1997, 1998 and 2001)⁶².

Under the co-ordination of Daniel Côté (HEC - École des Hautes Études Commerciales, Montreal, Canada), a working group is set up in 1996 to study the strategies put in place by social economy groups (and particularly co-operative

holdings in the agri-food and financial sectors) to respond to the challenges of globalisation, increased competition and technological revolutions.

4.2.3. Enhanced collaboration between scientific bodies

In the mid-1990s, the International Centre begins a process of reflection aimed at bringing together the research carried out separately within its various scientific bodies. In particular, the functioning of the scientific commission on the Social and Cooperative Economy is questioned following the observation of a lack of communication with the International Scientific Council, but also between its two working groups. This fragmentation into two distinct fields of the social and cooperative economy is not without implications, as it is likely to call into question the oneness of the social economy concept. CIRIEC therefore needs to clarify its approach in this matter⁶³.



Illustration of Lionel Monnier (Lionel Monnier collection)

Furthermore, the work within the Scientific Council is also re-discussed, following the proposal put forward by Alan Thomas, a British member of the 'Social and Cooperative Economy' commission, to carry out cross-cutting research that would rally the two commissions around the notion of general interest, which is the intersection of the public economy and the social and cooperative economy⁶⁴. The 50th anniversary of CIRIEC in 1997 provides the opportunity to put this proposal into practice. Wishing to commemorate this jubilee with a project involving CIRIEC as a whole, the

International Scientific Council decides, at its meeting of 2 March 1996⁶⁵, to issue a collective publication on a topic common to both commissions and sets up a working group responsible for carrying out the publication under the aegis of the Scientific Council and a steering committee made up of Lionel Monnier, Bernard Thiry and the two presidents of the scientific commissions (José Luis Monzón and Helmut Cox). Two months later, on the fringes of the Lisbon congress, the first joint meeting of the International Scientific Council and the two commissions is held to determine the work topic: structural changes and general interest⁶⁶.

61 Alberto Zevi & José Luis Monzón (dir.), *Cooperativas, mercado, principios cooperativos*, Valencia, CIRIEC-España, 1994, 320 p.; Alberto Zevi & José Luis Monzón (Eds), *Coopératives, marchés, principes coopératifs*, Brussels, Éditions De Boeck Université, [1995], 344 p.; José Luis Monzón, Roger Spear, Alan Thomas & Alberto Zevi. *Cooperatives, Markets, Cooperative Principles*, Liège, CIRIEC, 1996, 288 p.

62 Jacques Defourny, Louis Favreau & Jean-Louis Laville (dir.), *Inserción y nueva economía social. Un balance internacional*, Valencia, CIRIEC-Spain, 1997, 390 p.; Jacques Defourny, Louis Favreau & Jean-Louis Laville (dir.), *Insertion et nouvelle économie sociale. Un bilan international*, Paris, Desclée de Brouwer, 1998, 372 p.; Roger Spear, Jacques Defourny, Louis Favreau & Jean-Louis Laville (dir.), *Tackling Social Exclusion in Europe. The Contribution of the Social Economy*, Aldershot, Ashgate, 2001, 359 p.; Jean-Louis Laville, Marthe Nyssens & Antonia Sajardo Moreno (dir.), *Economía social y servicios sociales*, Valencia, CIRIEC-Spain, 2001, 359 p.; Jean-Louis Laville & Marthe Nyssens (dir.), *Les services sociaux entre associations, État et marché. L'aide aux personnes âgées*, Paris, Éditions La Découverte, Coll. Recherches, 2001, 288 p.

63 CIRIEC archives, Brief report of the informal meeting on 3 May 1995. Paris.

64 CIRIEC Archives, Minutes of the meeting of the International Scientific Council. Brussels, 16 September 1994, p. 3-7.

65 CIRIEC archives, Minutes of the meeting of the International Scientific Council. Rome, 2 March 1996, p. 2-4.

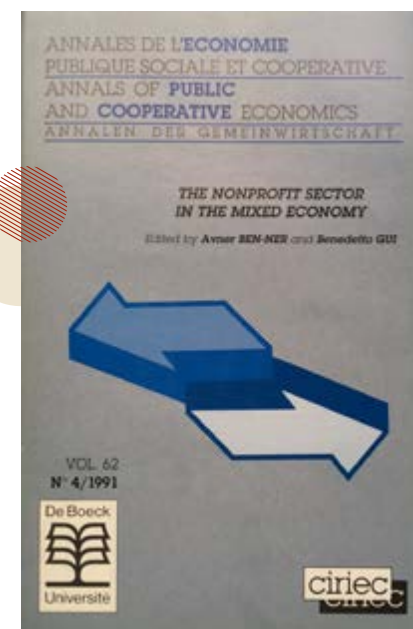
66 CIRIEC archives, Joint meeting of the International Scientific Council, the international Scientific Commission 'Social and Cooperative Economy' and the international Scientific Commission 'Public Enterprises'. Minutes of the meeting on 22 May 1996 in Lisbon.

4.3. Development of publications

Although international congresses are a logical outlet for the results of the research carried out within the CIRIEC network, they are not sufficient (congresses are only held every other year). In order to ensure faster dissemination, CIRIEC steps up its publication efforts. This strategy pays off and improves the visibility of the International Centre; nevertheless, the multiplication of editions is increasingly accompanied by a counterproductive lengthening of the time required to publish works. Moreover, CIRIEC is obliged to develop new initiatives to promote its publications (such as the organisation of presentation seminars) in order to compensate for the publishing house's shortcomings in the disseminating of its output. The downside of the enhanced editorial policy and attendant promotional activities is an increase in costs and additional work for the CIRIEC secretariat.

The Annals of Public and Cooperative Economics

After dithering for several years over the future of CIRIEC's review, the Board decides, in 1988, to reinforce its scientific character at the expense of the militancy and expression of opinions which characterised it more under the direction of Edgard Milhaud and Paul Lambert. It opts for a bilingual quarterly journal with articles in French or English and summaries in four languages (French, English, German, Spanish)⁶⁷. On this occasion, the title of the journal is slightly modified to *Annals of Public and Cooperative Economics*⁶⁸. The German edition is definitively abandoned after the refusal of the Nomos publishing house to take it over and to associate it with their *Zeitschrift für öffentliche und gemeinwirtschaftliche Unternehmen*⁶⁹. As to the content, it is placed under the responsibility of specific bodies. In 1988, the evaluation process and the selection of articles is entrusted to two editors-in-chief, collaborators of Guy Quaden and specialists, one in the social economy (Jacques Defourny) and the other in the public economy (Bernard Thiry), assisted by an editorial secretary (Christine Dussart). In addition, a management board composed of associate editors and an editorial board whose members are appointed every three years are set up. The strategy pursued is to improve the scientific content and visibility of the review by trying to attract the collaboration of renowned researchers and scientists from outside the CIRIEC network. Thus, at the time of its creation, the management board includes some prestigious names in international research, such as the Englishmen David Heald and Saul Estrin, specialists, one in public economics and the other in emerging markets and the transition economy, or the American Avner Ben-Ner (University of Minneapolis), renowned for his work on non-profit organisations.



apparent: by 1991, significant progress has been achieved in the planning of the review (several issues are programmed in advance) and the editorial bodies note a qualitative improvement and a slight increase in the number of subscriptions⁷¹.

Yet, these measures prove insufficient to rectify the finances of the *Annals* and to increase its readership significantly: in 1994, the review is distributed in 44 different countries and the number of subscriptions taken out amounts to 682, three quarters of which are in seven countries only⁷². Distribution in Anglo-Saxon countries and outside Europe appears to be particularly deficient, making it more difficult to recruit English-speaking contributors. Therefore, at the end of the second contract with De Boeck-Wesmael in 1995, CIRIEC entrusts the publishing of the *Annals* to Blackwell Publishers. Based in Oxford, this publishing house specialises in scientific journals on economics and enjoys a wider distribution in English-speaking countries. This change of publisher is accompanied by an updated presentation of the review and its contents and an improvement in the linguistic quality of the articles in English. However, despite the publisher's promotional efforts, the *Annals* do not manage to find their place in the highly competitive market of economics journals and only in the early 2000s do they achieve noticeable results in terms of subscriptions.

67 From now on the title *Annals of Public and Cooperative Economics* / *Annales de l'économie publique, sociale et coopérative* will be mentioned as APCE/AEPSC in the footnotes.

68 In French, the term *économie* refers both to the 'economy' (in general) and 'economics' (the science). Hence the choice of the second term for the English edition of the scientific review.

69 Yvonne Gélard, *op. cit.*, p. 43.

70 CIRIEC archives, Minutes of the Board meeting in Brussels on 3 June 1988, [p. 4-5].

71 CIRIEC archives, CIRIEC – International Centre. Activity Report 1992-1993, p. 5-8 and Minutes of the Board meeting in Liège on 11 October 1991, p. 3-4.

72 Éric Geerkens, *op. cit.*, p. 410-411.

4.4. Activities of National Sections

A significant part of CIRIEC's activities also takes place within its national sections. It is obviously impossible here to retrace the history of each section in detail. We shall simply recall the main characteristics, activities and developments of CIRIEC's seven main sections:

4.4.1. CIRIEC-Germany

The *Gesellschaft für öffentliche Wirtschaft* (GöW), founded - as its name suggests - within the public economy in 1960, is one of the most dynamic members of the International Centre. It has a quarterly journal (*Zeitschrift für öffentliche und gemeinwirtschaftliche Unternehmen* - ZögU), runs a collection (*Schriftenreihe der GöW*) and a series of publications (*Schriften zum Genossenschaftswesen und zur Öffentlichen Wirtschaft*). Its intense scientific activity further takes the form of conferences, symposia and research papers which are also presented and discussed in German parliamentary assemblies. Among the recurring topics of this period, marked by the reunification of Germany, are of course analyses on the prospects for public enterprises in the former GDR and the impact of the new European regulations on the public economy. After the death of its energetic president, Theo Thiemeyer, in 1991, Prof. Dr. Peter Eichhorn (University of Stuttgart) takes over the reins of its scientific council. Between 1994 and 1998, CIRIEC-Germany provides the president of the International Centre in the person of Fritz Gautier⁷³.



Theo Thiemeyer greeting HM King Baudouin at the 16th CIRIEC Congress - Brussels, 1986 (CIRIEC collection)

4.4.2. CIRIEC-Austria

Founded in 1952 by Franz Rauscher, professor at the Vienna Trade Union School⁷⁴, within the social and public economy (under the name *Arbeitsgemeinschaft der Österreichischen Gemeinwirtschaft*), the Austrian section begins the 1990s under the leadership of a new secretary general, Gerhard Greiner. It has long been one of the sections most involved in CIRIEC's international activities, notably through the figures of Anton Rauter (who was President from 1980 to 1994) and Walter Fremuth (director of the section's scientific council since 1973 and member of the Praesidium). As a body representing the interests of the non-private sector of the economy, it accounts for between one fifth and one third of Austrian industry in the early 1990s. In 1991, it is renamed *Verband der öffentlichen Wirtschaft und Gemeinwirtschaft*. Its work to promote the non-private sector economy among the general public takes a variety of forms: debates, seminars, radio and television broadcasts, research, publications including a quarterly scientific journal *Gemeinwirtschaft*, a monthly periodical *Gemeinwirtschaft Aktuell* and the regular publication of a statistical and analytical directory of the Austrian public and social economy. It celebrates its fortieth anniversary in style with an official ceremony in the Vienna City Hall (1 May 1992), a scientific event in Linz (19-20 May) and the publication of a book on the public and social economy in Austria⁷⁵. From 1992 onwards, it also manages the affairs of the Association of Municipal Enterprises in Austria (*Verband kommunaler Unternehmen Österreichs* - VKÖ), which aims to defend the interests of municipal enterprises active in the supply of electricity, gas and district heating in the face of the European Union's drive towards liberalisation. Austria's accession to the EU (1995) is accompanied by a major effort to inform the general public (particularly about European integration and privatisation) and a partial reorientation of its objectives towards greater consideration of the general interest and the fight for an active employment policy.

4.4.3. CIRIEC-Belgium

Chaired since 1980 by Leona Detiège, a member of the Vlaamse Raad, who has since held various political positions⁷⁶, the Belgian section is undoubtedly the one that has established the closest links with the International Centre: it has been the

73 Fritz Gautier (1950-2017). This doctor of chemistry has held numerous management positions in a number of municipal and energy-related companies and associations (deputy managing director of the Association of Municipal Companies, managing director of the Cologne municipal companies (water, gas, electricity, etc.), director of Ruhrgas AG (2001-2004) and Gaz de France (2005-2008), vice-president of the Association of German Electricity Generators, chairman of the European Federation of Local Energy Companies). In parallel, he had a successful political career in the German Socialist Party (SPD) as a Member of the European Parliament (1980-1987), Member of the German Bundestag (until 1994) and Alderman of the City of Cologne (1989-2000).

74 A member of the Nationalrat from November 1945 to 1949, Franz Rauscher participated in the reconstruction of the Austrian Socialist Party after the Liberation and briefly held the position of State Secretary for Heritage Preservation and Economic Planning. («Franz Rauscher», in *Maitron. Dictionnaire biographique du mouvement ouvrier [Biographical Dictionary of the Labour Movement]* [consulted online: <https://maitron.fr/spip.php?article197641>].

75 Walter Fremuth (dir.), *Öffentliche Wirtschaft und Gemeinwirtschaft in Österreich: Grundlagen - Entwicklungen - Dimensionen. Das Handbuch* [Public Economy and 'Gemeinwirtschaft' in Austria: Fundamentals - Developments - Dimensions. The Handbook], Vienna, Manz, 1992, 564 p.

76 She was Secretary of State for Pensions from 1985 to 1992, Community Minister for Labour and Public Health (and subsequently for Labour and Social Affairs) from 1992 to 1995 and Mayor of Antwerp from 1995 to 2003. Between 2012 and 2014, she was a senator.

headquarters of the Centre since 1957, provides the position of director, manages the secretariat and the editorial content of the *Annals*, and is responsible for public relations and contacts with the various member sections. However, this does not prevent it from carrying out intense scientific activity centred on research⁷⁷. Most often commissioned by companies or public authorities, this research regularly results in publications (working papers, articles in scientific journals, books, etc.) or presentations at seminars and conferences. In April 1991, the section organises an international conference at the University of Liège entitled *Public Versus Private Enterprises In Search Of The Real Issues*, with Pierre Pestieau, professor of economics at the same university, as scientific director. In order to promote research in public economics (in particular in the field of services of general interest, public policy tools and evaluation), it introduces the Joseph Merlot - Joseph Leclercq Award in 1964. This award, named after two founding members of the section, rewards (every two years, and from 1993 onwards, every three years) a doctoral thesis in one of the disciplines of the humanities and social sciences with public economics as its subject of study. CIRIEC-Belgium also plays an active role in the defence of general interest missions and the affirmation of the social economy sector. Thus, on the occasion of the Belgian presidency of the European Community, it organises the 4th European Social Economy Conference held in Brussels from 8 to 10 November 1993 in collaboration with Belgian cooperative and mutualist organisations (Febecoop, Arco Group, National Union of Socialist Mutualities and National Alliance of Christian Mutualities). Attended by around 700 people from some twenty countries, the conference ends with a round table discussion bringing together government representatives from seven countries (Belgium, France, Germany, Ireland, Italy, Portugal and Spain), European delegates from the three components of the social economy and the Director General of DG XXIII of the EEC. The conclusions highlight the achievements and demands of the sector. Following this important event, a Consultative Committee of Cooperatives, Mutual Societies, Associations and Foundations in the European Union is set up, chaired by Bernard Thiry, to advise the Commission on proposals concerning these various structures. In the framework of the *Fondation pour l'enseignement de la coopération* [Foundation for Education in Cooperation], the Belgian section is also involved in the development of an itinerant Chair in Cooperation travelling between various Belgian universities. Finally, the section also manages a documentation centre specialising in the public, social and cooperative economy.

4.4.4. CIRIEC-Spain

Less than five years after its emergence, CIRIEC-Spain is already an active member of the International Centre. It is created in 1986 on the initiative of

⁷⁷ Between 1992-1993 and 1996-1997, the section carried out, alone or in collaboration with Belgian universities, an average of no less than nine research projects per year on subjects as diverse as the pricing of public transport services, cooperatives facing the European market or the role of the State in mixed local enterprises, etc. In 1994-1995, no less than seventeen studies were carried out simultaneously! See CIRIEC archives, Activity Reports, April 1994 (p. 43-45), May 1996 (p. 46-50) and May 1998 (p. 56-60).



José Luis Monzón at the 25th Congress of CIRIEC - Lyon, 2004 (CIRIEC collection)

the cooperative movement, groups of academics working in the field of the social economy and the Spanish Government's former General Directorate of Cooperatives and *Sociedades Laborales* [worker-owned limited companies]. Close to the University of Valencia (it has its headquarters there and is chaired by one of its professors, José Luis Monzón Campos), the Spanish section develops considerable editorial activity. It publishes a scientific quarterly (*Revista de debate sobre economía pública, social y cooperativa*, renamed *CIRIEC-España*), contributes to the journal *Noticias* of the Documentation Centre on the Public, Social and Cooperative Economy (which it set up with the university) and launches two series, *Legislación y Jurisprudencia* and *Cuadernos de Trabajo*. In the 1990s, it is entrusted by the Government with various important research projects («White Paper on the Social Economy in Spain»; preparation of satellite accounts of the social economy for the EEC⁷⁸, etc.). It organises various congresses (including the CIRIEC congress in 1992) and study days, and plays an important role in the organisation of the 5th European Social Economy Conference in Seville. At the time of its tenth anniversary in 1996, it has some 300 members (250 individuals and 50 legal entities).

4.4.5. CIRIEC-France



Nicole Guillard, secretary of CIRIEC France, and Guy Poucy, trade unionist and general secretary of CIRIEC France (CIRIEC-France collection)

The revival of the French section, which is historically the oldest section of CIRIEC (it was set up in 1950), began with the Bordeaux congress (1988) and was confirmed in the early 1990s with the involvement of the tandem of François Soulage (University of Nanterre) and Lionel Monnier (professor at the University of Rouen and the University of Caen between 1992 and 1994). The former is Inter-ministerial Delegate for the social economy, president of the *Institut de développement de l'économie sociale* (IDES) and of the financial holding company ESFIN, and president of CIRIEC-France. The latter is appointed president of the section's scientific

⁷⁸ National accounting systems are unable to single out the social economy sector and therefore to determine its share of a country's economic activity. Rather than modifying these systems, it was recommended that satellite accounts (i.e. structured data sets, each covering a specific sector, but still linked to the national accounting system) be developed. Satellite accounts for the social economy are therefore a valuable advocacy tool, as they demonstrate and quantify its crucial contribution to the national economy and thus contribute to its support at the policy level.

council. In this capacity, he is involved in the work of the International Centre's scientific commission on Public Enterprises (before succeeding Theo Thieme as president of the International Scientific Council). In November 1995, CIRIEC-France modifies its statutes in order to integrate the four sectors of the general interest economy (public economy, social economy, mixed economy and trade unions) in its structure and appoints Jacques Fournier as president. In order to re-energise its national audience, the section organises numerous study days and debates on issues such as the general interest or the mixed economy, before resuming a policy of publications (*Critique de la raison communautaire*)⁷⁹.

4.4.6. CIRIEC-Italy

The Milan-based *Centro italiano di ricerche e d'informazione sull'economia delle imprese pubbliche e di pubblico interesse* begins the decade tragically with the death of its founder and secretary general (since 1956) Alberto Mortara. Thanks to the involvement of Giuseppe Boggetti, Massimo Pinchera and Dante Cosi, who form a three-headed board, the section succeeds in



Alberto Mortara and Gerhard Greiner at the 16th Congress of CIRIEC - Brussels, 1986 (CIRIEC collection)

maintaining a high volume of activities. On account of the importance of the public economy in Italy after the Second World War, CIRIEC-Italy focuses on companies in this sector and on the public interest. Its research activity takes place both within the institutional framework and on behalf of national, regional and international bodies or companies (including the EEC, for which it draws up a Guide for Public Procurement). The section is characterised by its prolific editorial activity (it publishes a journal *Economia Pubblica* and manages several collections, including historical series, with publications dedicated to each major Italian public enterprise) and by its documentation centre, which consists of an extensive library, archives (balance sheets of public enterprises) and databases (particularly on the history and standards of public bodies). In the early 1990s, the section has some 200 members.

4.4.7. CIRIEC-Japan

The Japanese section joins CIRIEC International in 1985. Close to academic circles, where most of its 300 members come from (as well as its president, Hisao Onoe, and its secretary general, Shunzo Nitta), it develops its work mainly in the field of public economics. Nonetheless, it chooses to address the topic «The Social Economy - Markets and Society» at the international symposium it organises on the occasion of its tenth anniversary (University of Tokyo, 7-8 October 1995). Unfortunately, the section's international scientific exchanges are hampered by geographical distance and the scarcity of English translations of its considerable scientific output.

4.5. Cooperation with other international organisations

Although CIRIEC is the only international centre to cover the whole of the general interest economy, it works alongside many other international associations whose objective is to study or defend a particular sector of this economy. In the 1990s, contacts multiply: the compartmentalisation between the various structures active in the same fields gradually recedes, particularly in the social economy where a double phenomenon is underway.

On the one hand, the aim is to ensure that the European Commission takes account of this rapidly developing sector and to present a united front in the face of certain demands. For example, the Portuguese section, one of the organisers of the 3rd European Social Economy Conference (Lisbon, April 1992), insists on the massive involvement of CIRIEC, in order to put pressure on the European Commission for the recognition of a European Cooperative Enterprise Statute. The establishment of this European statute, through a directive in 2003, is considered a great victory by the actors of the social economy.

On the other hand, the development of research in the social economy, the number of specialists in the field and the number of publications call for better coordination in order to avoid duplication and unnecessary competition and to set up collaborations within the framework of large-scale research projects carried out at European level. This is a key issue for CIRIEC as its financial stability and the continuation of its scientific activities are dependent on these contracts. However, it struggles to take advantage of these assignments to gain recognition and manage to finance its own research. It is therefore most often involved as a subcontractor. The question of collaboration with other networks active in the public and social economy is regularly raised at CIRIEC meetings. It gives rise to both positive reactions in terms of funding of activities, visibility and strengthening of the network, but also concerns about the dangers of competition or recuperation that come with it. The unfortunate experience of the creation of the European Centre for Public Enterprises (CEEP) in the 1970s, which deprived CIRIEC of some of its members, largely explains this reticence.

This is what emerges from the debates around the European Social Economy Club (CEDES) founded in Rome in September 1991. This consultation and

⁷⁹ Lysiane Cartelier, Jacques Fournier & Lionel Monnier, *Critique de la raison communautaire : utilité publique et concurrence dans l'Union européenne* [Critique of the Community Rationale: Public Utility and Competition in the European Union], Paris, CIRIEC France-Economica, 1995, 257 p.

information forum is meant to bring together representatives of organisations and administrations active in the social economy from various European countries (Belgium, Spain, France, Ireland, Italy, Portugal and Sweden). The collaboration of CIRIEC International and its various sections with this structure is highly strategic, insofar as CIRIEC is carrying out an exploratory mission on behalf of the European Commission (DG XXIII) at the time, with a view to setting up a European network of social economy research institutes. Although CIRIEC International is represented on the project's scientific committee by José Luis Monzón Campos and Bernard Thiry, achieving cohesion within the CIRIEC network as a whole proves very difficult. Indeed, some sections are very reluctant to join a club alongside organisations from their own country with which they have strained relations. The initiative is short-lived.

The 1990s witness a strengthening of links with the International Association of Mutual Benefit Societies (AIM), with the European Council of Associations of General Interest (CEDAG) and above all with the International Co-operative Alliance (ICA) and its European branch (ICA Europe set up in 1994). Fruitful collaborations are established with the latter, particularly within the working group on cooperative principles: a colloquium on this topic is organised by CIRIEC-Spain and the ICA in Seville in 1994. The links are so strong that the scientific commission on the Social and Cooperative Economy considers opening up to certain representatives of these bodies. However, due to mistrust, the Council does not follow this idea and opts instead for the organisation of seminars where the results of research work (once published) are presented and discussed in the presence of external experts⁸⁰.



Brochure: *International Cooperative Alliance. Ses Buts et son Œuvre*, London, s.d. (IHOES collection)

The public economy sector is undergoing much the same development as the social economy sector, with an increase in public enterprise initiatives. In February 1994, a European Liaison Committee on Services of General Interest (CELSIG) is set up. This committee intends to play a scientific role and prepares to organise the 1st European Forum of Social Actors on Services of General Interest, to be held in Brussels at the end of November 1994. CIRIEC fears that this might have a negative impact on participation in its own congress, which is to be convened in Graz the same year. However, this does not prevent CIRIEC from taking part in the second edition of the Forum, also held in Brussels at the end of October 1996. Insofar as the European Liaison Committee's other mission is to lobby the European authorities, it also crosses into the territory of the European Centre of Enterprises with Public Participation (CEEP), which has been entrusted by the



Commission of the European Communities with the task of drawing up a European Charter for Public Services. CIRIEC is associated with the project alongside its main competitor. In October 1994, it organises a seminar in Cologne on the topic «The economic approach to public services», the various contributions to which are included in the appendix to the report *Europe, competition and public services* (1995), in which the CEEP denounces the destabilisation of the organisation of public services and recommends a revision of the Treaty of Rome.

These two initiatives illustrate the difficulty (or lack of real willingness) of CIRIEC's decision-making bodies to seize this opportunity and place the Centre on the front line, or even to initiate projects relating to issues in which it definitely has real expertise.

⁸⁰ CIRIEC archives, Minutes of the meeting of the International Scientific Council. Brussels, 16 September 1994, p. 10-11.

CHAPTER III: INCREASED GLOBALISATION (1997-2004)

1. Overall Economic Context

1.1. The Single Currency and the Asian Crisis

In 1997, CIRIEC celebrates its 50th anniversary. The same year marks the beginning of the European Union's fifth phase of enlargement. The Luxembourg European Council launches the accession process of ten new countries from Central and Eastern Europe (Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia) as well as Cyprus. In 2000, Malta is next. Four years later, on 1 May 2004, Europe grows from 15 to 25 members. Only Bulgaria and Romania are delayed by a few years.



The year 1999 begins with a major event at European level: the euro is now the single currency for economic and financial exchanges in eleven European countries (Austria, Belgium, Finland, France, Germany, Ireland, Italy, Luxembourg, the Netherlands, Portugal and Spain)⁸¹. On the upside, this agreement greatly facilitates trade and the movement of citizens between the countries involved and consequently the exchanges in CIRIEC, whose members frequently travel to congresses and administrative or scientific meetings. On the downside, the adoption of the single currency requires compliance with a series of rules under the Stability and Growth Pact. States undertake to aim for a balanced budget and to submit an annual stability programme to the European authorities⁸². Bad performers are liable to sanctions⁸³. Most countries in the euro zone therefore introduce tax reforms (lowering corporate tax in order to stimulate employment; introducing new taxes, particularly ecological taxes, or measures to broaden the tax base) and, at the same time, implement austerity policies to curb public spending. In many

⁸¹ Greece joins the group in 2001. The European fiat currency (coins and banknotes) is put into circulation on 1 January 2002.

⁸² Two criteria are particularly demanding, as they require that the budget deficit of euro zone countries should not exceed 3% of their Gross Domestic Product (GDP) and that their debt be less than 60% of GDP.

⁸³ Until 2003, three countries (Portugal, Germany and France) are subject to an excessive deficit procedure launched by the Ecofin Council. In March 2005, a reform of the pact is decided in order to make it more flexible and to take into account the economic recession. However, by 2010, the effects of the subprime crisis prevent most countries from complying with the provisions of the pact. Not until the coronavirus crisis does the European Union temporarily suspend the budgetary discipline rules imposed on Member States.

countries, this takes the form of cuts in health care spending, pension reforms and further privatisation between 1999 and 2002⁸⁴.

At the global level, the end of the 1990s is marked by the Asian crisis and a deep recession in Japan, one of the economic engines of the region. Initially spared by the slowdown in economic activity (due in part to strong US consumption and the hopes raised by monetary union), the United States and Europe are also affected by the phenomenon, which is accentuated by the panic on the markets following the attacks of 11 September 2001, and then by their concerns related to the armed conflicts that followed. The shock wave spreads to the economies of Asia and Latin America (notably a very sharp recession in Argentina). The crisis takes hold in many countries. Only in 2004 does the world economy begin to recover.

1.2. New Paradigm for General Interest

The landscape of the general interest economy undergoes a profound change. The public economy continues its decline, on account of the process of privatisation of public enterprises (notably in the fields of transport, telecoms, banks, etc.), while the gradual modification of the missions and the mode of financing of public enterprises (reinforcement of the need for profitability; opening up to external capital) gradually leads to a weakening of what used to be their specificities, as the differences between them and capitalist enterprises tend to blur. This phenomenon is also accentuated by the creation of new mixed enterprises, but also by the growing development of public-private partnerships. As proof of this evolution, the notion of public service gradually gives way to that of service of general economic interest (SGEI)⁸⁵, which is included in Article 16 of the Treaty of Amsterdam⁸⁶.

The social economy undergoes a phenomenon of complexification, as shown by the decooperativisation and demutualisation of various social economy

84 Jérôme Creel, Thierry Latreille & Jacques Le Cacheux, «Le Pacte de stabilité et les politiques budgétaires dans l'Union européenne» [The Stability Pact and Budgetary Policies in the European Union], *Review of the French Economic Observatory (OFCE)*, 2002/5 (n°83 bis), p. 255-256.

85 SGEIs are economic services (traditional public infrastructure services - transport, water, energy, etc. - as well as health care, childcare, access to the labour market, social housing, care and social inclusion of vulnerable groups) which, because of their contribution to the population as a whole, can (under certain strict conditions) be exempted from EU competition rules. However, their competition with private capitalist operators tends to take precedence.

86 Article 16 reads as follows: «...given the place occupied by services of general economic interest in the shared values of the Union as well as their role in promoting social and territorial cohesion, the Community and the Member States, each within their respective powers and within the scope of application of this Treaty, shall take care that such services operate on the basis of principles and conditions which enable them to fulfil their missions.» [consulted online: <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:11997D/AFI/CE:FR:HTML>].

enterprises, the development of holding companies or the gradual replacement of traditional (relatively compartmentalised) sectors by hybrid forms in strong competition with each other. At the same time, the third sector is experiencing strong growth, particularly in terms of enterprises providing local services or responding to new social concerns (socio-professional integration, solidarity finance, fair trade, etc.), sometimes putting them in competition with private enterprises⁸⁷. Furthermore, the ratification of the European Cooperative Statute in 2003 is seen as an important victory for the social economy. Little by little, it is losing its status as a 'parallel' economy and increasingly emerges as a sector in its own right.

This dual context obviously has repercussions on CIRIEC's field of research which, as we shall see, will progressively integrate topics such as (de)regulation, governance and management over this period.

1.3. Rise of the 'E-Economy'



At the dawn of the 21st century, the digital revolution is also making its way into the daily lives of ordinary people. The digital era brings about a complete upheaval in society, marked by the appearance of new types of services and new economic players. The rapid spread of the internet and mobile telephony in the last decade of the 20th century, and then of smartphones, is followed at the beginning of the next century by the explosion of social networks and, in their wake, the appearance of the Web giants (the GAFAs) offering a multitude of online services (e-commerce, downloading platforms, etc.). The global economy undergoes a far-reaching transformation that also affects its social and public components; a phenomenon that will accelerate in the mid-2010s, leading to its consideration in CIRIEC's research fields.

2. Internationalisation of CIRIEC's Network

While in the early 1990s CIRIEC had only a handful of active members and was very Eurocentric (apart from the Japanese, Canadian and Argentinian sections), CIRIEC becomes more international in the late 1990s and early 2000s. This is the result of a major prospecting effort. On the eve of its 50th anniversary, CIRIEC realises that it is impossible to carry out all the projects at once, and sets itself a

87 Fabienne Fecher & Benoît Lévesque, «Le secteur public et l'économie sociale dans les *Annales* (1975-2007) : vers un nouveau paradigme» [The Public Sector and the Social Economy in the *Annals* (1975-2007): towards a new Paradigm?], *AEPSC/APCE*, Sep-Dec 2008, Vol. 79, n°3/4 (special centenary issue), p. 643-678.

series of development objectives and distributes the tasks required to achieve them among its main members.

One of the priorities is to create strong sections in the United Kingdom and the Netherlands, where CIRIEC has been trying in vain to establish itself for many years⁸⁸. However, these efforts remain unsuccessful.

Another avenue is to open up to the countries of Central and Eastern Europe (the CEEC: Bulgaria, Hungary, Czech Republic, Romania, Slovakia, etc.), from which CIRIEC receives numerous requests. The negotiations, led mainly by the German and Austrian sections, all come up against a financial obstacle, as the interested structures do not have sufficient means to cover the costs of attending the meetings and/or to provide the section with a solid base. The project submitted by CIRIEC and the Institute of International Social Cooperation (ICOSI), within the European PHARE-Democracy framework (specifically oriented towards Central and Eastern European countries) is not retained.



Japanese delegation with Barbara Sak at the 24th CIRIEC Congress - Naples, 2002 (CIRIEC collection)

A third strategy will ultimately prove to be more successful: namely, to bank on greater representativeness at world level by multiplying the less financially stable, but more distant sections, such as in Asia and especially in Latin America.

However, CIRIEC initially not only has difficulties in expanding its network, but also in maintaining it. As it prepares to celebrate its 50th anniversary, the Board meeting of 18 January 1997 examines three cases of sections deemed to be 'problematic': Greece, Slovenia and Portugal.

In October 1998, for the first time in its history, the International Board meets in Asia, in Tokyo. During this meeting, it decides to suspend the Greek section. Created by important representatives of the cooperative and public sectors, it has not been active for almost a decade and is not involved in CIRIEC at all. In the months that follow, contacts are established with social economy circles (and more particularly with the Panco movement - Panhellenic Forum of the Social Economy - which brings together the associative and mutualist sector) with a view to relaunching the section or creating a new one. CIRIEC's reputation in Greece has been tarnished by the long inactivity of the former section, so the

task is not easy. Only in 2001 is the new Greek section established within Panco. The president and the secretary general of the movement, Kostas Paiputlidis and Akis Economakis, hold the same position in the section. The section's objective is to develop activities in the field of the social economy, before opening up to the public economy in a second phase. In 2002, it organises the 1st Social Economy Congress in Athens, which is very successful, and it is involved in a «Social Economy and Employment» forum held in Rhodes in 2003, during the Greek Presidency of the European Union. At the same time, it develops contacts with the umbrella organisation of the public economy, as it had promised to do. Despite this promising new start and clear evidence of goodwill, the section faces administrative difficulties and is unable to pay a single membership fee. After three years, in April 2004, the International Board is obliged to suspend the Greek section once again, while maintaining contact with the new director Alexandro Krauss, who is responsible for the international relations of the Federation of Greek Mutuals, with a view to resurrecting it as soon as possible.



Program of the 21st CIRIEC Congress - Lisbon, 1996 (CIRIEC collection)

Although regular contacts are kept up with Manuel Canaveira de Campos, its vice-president (and president of the Portuguese Cooperative Institute - INSCOOP), the Portuguese section seems to have fallen into lethargy since the successful organisation of the 21st International Congress (1996). At the beginning of the 2000s, the section no longer gives any sign of life and stops paying its membership fees. Its leaders (President Maldonado Gonelha and Director Magdalena Santos Ferreira) are absent, and repeated calls for the section to regain its strength and reintegrate into the various bodies remain unsuccessful. The absence of a single representative of the various social economy organisations makes it difficult for the International Centre to attempt to revive the section, as it would mean establishing separate contacts with each of the components of the Portuguese social economy.

The Slovenian section is in a similar situation. Created in 1992, it experiences a slump a few years later. After an attempt to revitalise itself, which is marked by the organisation of an international colloquium in October 1997 on «Privatisation and deregulation of the public sector in Slovenia», it too ceases to fulfil its obligations. The former head of the section, Rado Bohinc, who is now the Minister of the Interior, remains the only existing contact.

At its December 2002 meeting, the International Board decides to suspend the Portuguese section (after 20 years of existence) and its Slovenian equivalent⁸⁹.

Fortunately, a more encouraging signal had meanwhile emanated from the far reaches of Europe, from Turkey. In a geopolitical twist, just as the old Greek section is being buried, a new section is born in Ankara around three Turkish cooperative associations (the Cooperative Association of Turkey, the Central Union of Turkish Agricultural Credit Cooperatives and the Union of Beet Growers' Cooperatives). Contacts with the initiator, Burhan



Bernard Thiry, Karl Oettle, Juan del Pino Artacho, Mrs. del Pino Artacho, Giuseppe Bognetti, Sandra Bognetti, Burhan Aykaç, Hajime Imamura and Lionel Monnier during an International Scientific Council - Ankara, 2001 (CIRIEC collection)

Aykaç, vice-president of the Turkish Cooperative Association and dean of the Faculty of Administrative Sciences at Gazi University (Çorum), go back several years: CIRIEC's director attended the Turkish Cooperatives Congress in November 1996 and a Turkish delegation attended the 50th anniversary celebrations of CIRIEC. Therefore, the International Board approves the membership of the Turkish section in CIRIEC at its February 1999 session in Rome on the basis of a serious project, which guarantees to cover also the public economy⁹⁰. There are, however, strings attached to this recognition: the new section must commit itself to active participation in the Centre's activities, to fulfilling its commitments to work on the public economy, and to generating sufficient financial resources by 2001 to pay a minimum membership fee and cover travel expenses. CIRIEC-Turkey is very active in «disseminating the cooperative spirit»⁹¹, which it does through publications (studies and several journals), but also training courses, round tables, conferences, etc. It organises the International Congress of Turkish Cooperatives (autumn 2002) and is involved in the life of CIRIEC: in June 2001, on the sidelines of the International Scientific Council meeting that it hosts in Ankara, it organises an international seminar on the problems faced by cooperatives in

Turkey and in the world. Burhan Aykaç becomes a member of the Praesidium in 2002 and the International Board meets in Istanbul in May 2003.

Latin America proves to be the most favourable ground for the development of CIRIEC. This time, CIRIEC-Spain - in particular via the Ibero-American Foundation for the Social Economy (FUNDIBES) which it sets up in 2003 - and CIRIEC-Canada are, quite logically, in charge. The former for linguistic reasons, the latter for reasons of proximity. They survey many countries: Chile, Uruguay, Cuba, Peru, Mexico, etc., but finally Venezuela and Brazil yield the first results.

A section is created in Caracas (Venezuela) on 19 November 1999, within the framework of the national conference of academics and cooperators *Juntos por un nuevo país* [Together for a new country]. Close to the social and solidarity economy, the Venezuelan section is attached to the Centre for the Study of Participation, Self-Management and Cooperativism of the Central University of Venezuela (CEPAC-UCV), while associating representatives from other universities in the country. It is officially recognised as a section of CIRIEC at the General Assembly in Montreal in June 2000⁹². CIRIEC-Venezuela is very active at national level and more generally in Latin America (it works with cooperative movements in Chile and Colombia and is a good showcase for CIRIEC on the subcontinent): it has a journal (*Capaya*), organises symposiums (notably on the role of the social economy in regional development) and sets up collaborations with universities. However, the section quickly proves to be financially unsound and is slow to react to proposals made to try to find a solution to the problem (in particular to resort to European aid programmes for Latin American countries). In 2003, the section is suspended (at its request) until it can pay its debts. Nevertheless, it expresses its intention to continue participating in the work of the scientific commissions and their working groups.



Former CIRIEC Brazil logo (CIRIEC collection)

CIRIEC-Spain establishes numerous contacts with the Brazilian academic world, and in particular with the *Unitrabalho Foundation* (Interuniversity Fund for Labour Studies and Research). However, another avenue leads to the creation of a Brazilian section in 2002: two meetings are held (in Sao Paulo in 2001 and in Curitiba in 2002) between a CIRIEC delegation, made up of the director and representatives of the Spanish section (including José Maria Perez de Uralde, CIRIEC-Spain's international relations officer) and two professors from the universities of Paraná (Maurício Serva) and Campinas (Altamiro Castilho). They gather other professors from universities in the country and together form a partnership with the *Centro Educacional de Tecnologia em Administração* (CETead), a socio-professional organisation based in Salvador de Bahia. The section is officially recognised in

⁸⁹ CIRIEC archives, Minutes of the International Board of CIRIEC. Leipzig, 16 December 2002, p. 2-3.

⁹⁰ CIRIEC archives, Minutes of the International Board meeting, Rome, 8 February 1999, p. 6-7.

⁹¹ «Turkish Section. Activity Report 1999» in CIRIEC, Activity Reports. *International Centre and national sections*, [Liège], CIRIEC, June 2000, p. 109.

⁹² CIRIEC archives, Minutes of the General Assembly of CIRIEC, Montreal, 15 June 2000, p. 6.

May 2002⁹³, with Maurício Serva as president and Altamiro Castilho (CETead's general director)⁹⁴ as director. In an effort to formalise its constitution, the Brazilian section organises an international colloquium⁹⁵ the following autumn, during which it hosts a meeting of the International Scientific Council and one of the International Board. This is the first meeting of CIRIEC's supreme governing body on the South American subcontinent. Faced with the rise of economic sociology in the country, the young section is counting on CIRIEC to help it counter the essentially neo-liberal perspective in which this discipline is taught by making the notions of social market economy and plural and solidarity economy better known through scientific work. After the election of Luiz Inácio Lula da Silva (Workers' Party) as president, the section invests in a series of research projects such as support for the development of small producer networks (particularly in the field of ecological agriculture) and the management of non-governmental socio-professional organisations in social projects.

In 2003, the various Latin American sections, faced with travel difficulties (due to budgetary constraints), suggest that CIRIEC set up a virtual site for reflection on scientific research. As we shall see, this is one of the avenues explored in the course of the strategic operation, an important process of reflection that begins shortly afterwards, at the initiative of Benoît Lévesque (professor at the University of Quebec in Montreal), the president of the Scientific Council.

3. Evolution of the operating mode

3.1. Evolution of internal structures

3.1.1. Praesidium

The introduction of the rotation principle within CIRIEC's bodies leads to a period of regularly revolving positions, in stark contrast with the stability, not to say the immutability, of the Praesidium over many years. Between 1998 and 2002, three presidents succeed one another at the head of the decision-making body, each for a single two-year term. Massimo Pinchera, secretary general of the Italian section, is succeeded by Jacques Fournier, honorary president of the French national railway company (SNCF) and Gaz de France and president of CIRIEC-France (in 2000), and then José Luis Monzón Campos, professor at the University of Valencia and president of CIRIEC-Spain (in 2002). However, in terms of individuals, the general composition of the Praesidium does not undergo major changes. In 1998, Katarina Grut, director of the Swedish Institute of Social

⁹³ CIRIEC archives, Minutes of the International Board of CIRIEC. Brussels, 21 May 2002, p. 2-3.

⁹⁴ CIRIEC archives, Minutes of the General Assembly of CIRIEC. Naples, 2 October 2002, p. 2.

⁹⁵ «Partnership between the State, civil society and the private sector for the production of public goods and goods of general interest» (Salvador de Bahia, 3-5 September 2003).



Jacques Fournier at the 24th International Congress of CIRIEC - Naples, 2002 (CIRIEC collection)

Economy (Östersund) joins the body as a representative of the Swedish section. The General Assembly in Montreal in June 2000 once again institutes the title of Honorary President⁹⁶, given to the outgoing president. Massimo Pinchera is the first to receive this distinction. More fundamentally, this GA marks the arrival of three new vice-presidents: Fritz Gautier and Guy Quaden, who have been active in the Praesidium for many years, are replaced by Wilhelm-Georg Hanss, CEO of the Leipzig transport company and managing director of the Leipzig public transport and distribution company, and Leona Detiège, mayor of Antwerp and president of the Belgian section. Canada is represented by its president, Léopold Beaulieu, who is close to Quebec trade union circles (he is CEO of *Fondaction*, a development fund of the *Confédération des syndicats nationaux* [CSN - Confederation of National Trade Unions] for cooperation and employment). These last two vice-presidents will quickly become pillars of the International Centre, in which they will play an important and long-lasting role.

At its meeting in Naples in October 2002, the General Assembly appoints two new members to the Praesidium: Masatomi Funaba, Professor at the Kobe University of Commerce and vice-president of CIRIEC-Japan (eventually replaced by Hajime Imamura), replaces Professor Shunzo Nitta, who died shortly before. Furthermore, the Turkish section officially enters the Praesidium in the person of its founder, Burhan Aykaç.

3.1.2. Scientific Bodies

There is much greater continuity in the chairmanship of the various scientific bodies of CIRIEC. However, 2002-2003 marks a break: in a short space of time, there is a change in the presidency of the three scientific bodies, while some important changes are made in the composition of the commissions.

International Scientific Council

After ten years as president of the International Scientific Council (ISC), Lionel Monnier (University of Rouen, France) decides in 2002 to end his activities within CIRIEC. Benoît Lévesque, professor at the University of Quebec in Montreal and director of the Centre for Research on Social Innovations in the Social Economy, Enterprises and Trade Unions (CRISES), is chosen to replace him⁹⁷. He thus

⁹⁶ The title had already been awarded to Edgard Milhaud, when he passed the torch in 1960, to Maurice Delbouille in 1965 and to André Hirschfeld in 1978.

⁹⁷ CIRIEC archives, Minutes of the International Board of CIRIEC. Leipzig, 16 December 2002, p. 6.

becomes the first non-European to hold the 'top' position in a CIRIEC scientific body, a sign of the latter's openness to new continents. Benoît Lévesque quickly makes his mark on the ISC by proposing to review the role of the scientific body itself. The idea is to transform it into a forum for reflection on the «orientations, issues and challenges of the economy in the service of the general interest»⁹⁸, capable of devising a genuine research strategy for CIRIEC. At each meeting of the ISC, half a day is dedicated to



Bernard Thiry, José Luis Monzón and Rafael Chaves (CIRIEC collection)

discussing how to ensure the scientific development of the International Centre, to try to anticipate the evolution of research and to identify future topics that should be explored in a proactive manner. This is the beginning of the strategic planning exercise which, as we shall see in the next chapter, marks the dawn of a new era for CIRIEC.

Scientific Commissions

In May 2002, shortly before Lionel Monnier's departure, the ISC approves a *vademecum* aimed at better defining the functioning and coordination within CIRIEC's scientific commissions and working groups. In addition to practical issues (organisation of meetings, role of the international secretariat), this guide addresses questions such as the mission of leading a scientific think tank or the responsibilities in the event of publication. The guide recalls various basic principles: the chairmen of the commissions are appointed by the International Board, on the proposal of the ISC. Each body operates with two working languages, chosen on the basis of its composition, which is modified regularly so as to keep only the actual participants. In addition, the *vademecum* stresses the importance of subjecting the articles produced by the scientific bodies to an evaluation process in order to guarantee their quality and affirms the desire to involve new sections and those traditionally less represented. These new 'rules' are quickly put into effect: in February 2003, the ISC renews and rejuvenates the composition of the commissions by replacing about ten members who never attended the meetings⁹⁹. Moreover, the need to open up to the countries of the southern hemisphere is also becoming apparent.

When José Luis Monzón Campos becomes president of CIRIEC International in 2002, Rafael Chaves, also a professor at the University of Valencia (Spain), replaces him as head of the 'Social and Cooperative Economy' scientific commission.

A few months later, Helmut Cox, who had chaired the 'Public Enterprises' commission for more than ten years, is succeeded by Gabriel Obermann, professor at the Vienna *Wirtschaftsuniversität* [University of Economics and Business]. In addition to a new chairman, the commission is also given a new title 'Public Services/Public Enterprises'. This change was the subject of an extensive two-year debate, as the old title ('Public Enterprises') was outdated and no longer suited the commission's focus for two reasons. Firstly, the commission had long since abandoned the study of public enterprises as such to focus more on the privatisation process to which they had been subjected, and then on their missions. Moreover, the services of general interest that are at the heart of these missions are no longer the prerogative of public enterprises alone, as they were in the past, but can also be provided by private enterprises.

More cross cutting research across the spectrum of the general interest economy

In 1998, the ISC decides to create a transversal working group on a comparative study of social economy organisations, profit-making organisations and public organisations offering social and general interest services¹⁰⁰. The new group is cross-cutting in two ways: not only does it intend to address its subject within the two main components of the general interest economy, but also to transcend the various fields of the social economy (cooperatives, mutual societies, associations, etc.). Placed under the supervision of the International Scientific Council (ISC), the transversal working group is in line with the working group set up two years earlier (in view of CIRIEC's 50th anniversary), with the aim of publishing a book on the issue of the general interest in the face of structural change. This group formalises the International Centre's desire to decompartmentalise the functioning of its scientific bodies and to build on its specificity by developing its own approaches. It is therefore important that the research be steered by people close to the national sections and, with a view to strengthening the transversality of the project, by a tandem composed of specialists in the public economy on the one hand and in the social economy on the other.

3.2. The Team

Internally, the period is characterised by the increasingly important role performed by Barbara Sak, not only in the Belgian section, but also within the International Centre. Indeed, at the end of 1998, Bernard Thiry is appointed president of the management board of *Forem* (public service for training and employment of the Walloon Region). His availability, already limited by this new mandate, is further

⁹⁸ CIRIEC archives, *CIRIEC International. Activity Report 2002-2003*, p. 16.

⁹⁹ CIRIEC archives, Minutes of the meeting of the International Scientific Council. Paris, 22 February 2003, p. 4.

¹⁰⁰ «Plural economy and socio-economic regulation. A theoretical approach to the relationship between profit and non-profit, private and public organisations in the provision of social and general interest services». See: CIRIEC archives, Minutes of the meeting of the International Scientific Council. Cologne, 6 May 1998, p. 2-4 and Minutes of the meeting of the International Scientific Council. Paris, 12 September 1998, p. 2-3.

reduced when, less than a year later, he becomes director of the Belgian Commission for Electricity and Gas Regulation (CREG). Although he remains the director of the International Centre, he delegates a large part of the day-to-day management to his right-hand woman, Barbara Sak. At the Praesidium meeting of 12 June 2000, it is decided to recognise the role and work of Yvonne Gélard's successor by appointing her deputy director of the International Centre. At the end of 2002, Christelle Pasquier is hired to take care of the documentation centre.



The CIRIEC team at the Lyon Congress in 2004: from left to right: Marilyn Garcia, Suzy Lhonneux, Carmela De Cicco, Bernard Thiry, Christine Dussart and Barbara Sak (CIRIEC collection)

3.3. Internal life and finances

In 2002, the International Board decides to add the adjective 'social' to CIRIEC's English name to make it consistent with its French name: from now on, the Centre will present itself to English-speaking people under the name *International Centre of Research and Information on the Public, Social and Cooperative Economy*¹⁰¹. This change of name can be seen as a desire by CIRIEC to affirm the part played by the social economy (and not only the cooperative economy) within its activities.

Although the financial situation is healthy, it is not a smooth ride. Late payment (or even no payment) of membership fees is a recurring problem. In 2000, the accumulated debts of the national sections amount to 1 million Belgian francs (or €36,796 in 2021 prices)¹⁰². Moreover, the waiving of the debts of suppressed (notably Hellenic) sections further threatens the financial stability of the association. Problems with membership fees are regularly at the centre of debates at the International Board, which tries to find the right balance between understanding the difficulties faced by the sections (particularly those located in emerging countries) and the desire not to send out the wrong signal by making exceptions to the established rules, or even to lapse into misguided paternalism. Each time, there is a serious dilemma between sacrificing a section or keeping

¹⁰¹ CIRIEC archives, Minutes of the meeting of the International Board of CIRIEC. Leipzig, 16 December 2002, p. 9. It should be noted that CIRIEC's English name had swapped the term 'collective economy' for 'public and cooperative economy' in the mid-1960s.

¹⁰² CIRIEC archives, Minutes of the meeting of the International Board of CIRIEC. Seville (Osuna), 27 March 2000, p. 5.



CIRIEC logo from 1985 to 2008 (CIRIEC collection)

it on life support. It is a question of gauging the goodwill and dynamism of the defaulting sections and obtaining commitments from them to do everything possible to turn things around. Also, despite the regular revision of their amount, it proves to be unrealistic to ensure the viability of CIRIEC with membership fees alone: additional structural means of financing must be found. It should be noted that although the International Centre is often the creditor, it is sometimes itself a debtor, in particular to its Belgian section, which provides the permanent secretariat in return for partial reimbursement. Despite this highly underestimated amount¹⁰³, the International Centre sometimes finds it difficult to pay for the expenditure. For example, at the end of 2002, its debt to the Belgian section amounts to €18,000 (€25,650 in 2021 prices)¹⁰⁴.

As an essential complement to the few subsidies from the Belgian public administrations, external contracts, which are often remunerative¹⁰⁵, are an important source of income, but they require an enormous amount of work and the payment deadlines, particularly those practised by the European Commission, do not facilitate day-to-day management. In addition to this situation, CIRIEC has to bear a considerable cost when organising the international congress every other year (even years) (approximately €25,000). As a result, the balance sheet for even-numbered years traditionally closes with a deficit that we must try to make up in the following year. Nevertheless, the period is very positive, since in 1998 the General Assembly decides to set aside a surplus of 1.5 million Belgian francs (€57,230 in 2021 prices)¹⁰⁶. At the end of 2004, the cumulative profit of the International Centre still amounts to more than €12,000 (€16,487 in 2021 prices).

4. Scientific Activity

In 1998, as the Board is meeting in Brussels, Gerhard Greiner, secretary general of the Austrian section, notes that in his «15 years on the International Board, [...]»

¹⁰³ In 2002, the cost of this service is estimated at €75,000 (€106,874 in 2021 prices), while the actual costs amount to €115,000 (€163,873 in 2021 prices). The International Council therefore agrees to budget a maximum amount of €100,000 from 2003 onwards to cover secretariat expenses. See: CIRIEC archives, Minutes of the meeting of the International Board of CIRIEC. Leipzig, *op. cit.*, p. 5.

¹⁰⁴ CIRIEC archives, Accounting Documents, 2002-2003.

¹⁰⁵ For example, 2003 is a very 'good vintage', as it generates a surplus of €19,000 (€26,640 in 2021 prices).

¹⁰⁶ CIRIEC archives, Minutes of the General Assembly of CIRIEC. Cologne, 6 May 1998, p. 4.

CIRIEC has never been so active»¹⁰⁷. This is somewhat of an understatement, as CIRIEC even turns 'hyperactive' as it enters the 2000s.

4.1. The 50th anniversary celebrations of the International Centre

1997 is a special year for CIRIEC International, as it marks the 50th anniversary of its foundation: given the difficult circumstances in which the institution was created and the tribulations it has endured, half a century of existence is no mean feat. It is therefore appropriate to celebrate the event with dignity and to make it a showcase that will give the International Centre a high profile.

On this occasion, the book *Structural Changes and General Interest: Which Paradigms for the Public, Social and Cooperative Economy?* is published, the result of research work carried out, as we have seen, by the first transversal working group set up within CIRIEC¹⁰⁸. The aim of this book is to demonstrate the scientific quality of the organisation's work, to highlight the specificity of its approach (the study of the economy in the service of the general interest as a whole), and also, internally, to reaffirm the cohesion between its various components (in this respect, it shows an enormous concern for balance in terms of representation between the sectors, sections, etc.)



At the same time, an international colloquium is organised at the Palais des Congrès in Brussels on 25 and 26 September 1997 on the topic «The public, social and cooperative economy in the service of the general interest - What roles in the 21st century?» It brings together 500 participants from 31 countries (13 with national sections and others such as Hungary, the Netherlands, Russia, Turkey or Uruguay where CIRIEC hopes to establish itself in the near future). The official reception takes place in the prestigious *Palais d'Egmont* in Brussels, and the speakers at the colloquium include such personalities as Yvan Ylieff, Belgian Federal Minister for Scientific Research (who chairs the patronage committee), Giorgio Crisci (President of the Italian railways), Monika Wulf-Mathies (Member of the European Commission, responsible for regional policy) and Michel Rocard (former French Prime Minister and Member of the European Parliament).

4.2. International Congresses

The first two congresses of this period show the will of the organisers to get closer to the concerns of companies.

¹⁰⁷ CIRIEC archives, Minutes of the meeting of the International Board. 16 January 1998, Brussels, p. 6.

¹⁰⁸ Lionel Monnier & Bernard Thiry (dir.), *Structural Changes and General Interest: Which Paradigms for the Public, Social and Cooperative Economy?*, AEPSC/APCE, 1997, Vol. 68, n° 3 (special issue), 280 p.

Under the title «Human Resource Management in Public, Social and Co-operative Enterprises», the 22nd congress, which takes place in Cologne (Germany) on 4 and 5 May 1998, addresses various issues such as new labour relations within enterprises, employment prospects or the changing relations with users/citizens and members/customers. The event is attended by 350 participants from 21 countries, including representatives of the Organisation for Economic Co-operation and Development (OECD) and the European Trade Union Confederation (ETUC).



Guy Quaden at the tribune, with Marie J. Bouchard and Fritz Gautier in the background, at the 23rd International Congress of CIRIEC - Montreal, 2000 (CIRIEC collection)

2000 marks an important date in terms of the intercontinental opening of CIRIEC, since the 23rd congress is the first to be organised on the other side of the Atlantic. The city of Montreal is given the honour of hosting this premiere. On 13-14 June 2000, 500 participants discuss the topic «Social economy and public economy: new forms of cooperation in the era of globalisation». Five working sessions examine North-South and West-East partnerships and how they relate to a range of issues (national trajectories, global presence, local dynamics, corporate financing). Once again, the congress attracts representatives of international institutions such as UNESCO and the European Commission. It testifies to the increasingly active role played by the Canadian section within CIRIEC (and which will become even more pronounced after Benoît Lévesque's accession to the presidency of the International Scientific Council) and also marks the desire to strengthen contacts with the American continent and particularly with Latin America which, as we have seen, constitutes a favourable breeding ground for the establishment of new sections¹⁰⁹. The adoption of Spanish as the fourth working language for the congress is a good example of this.

After Canada, Italy hosts the international congress for the third and last time. It is held in Naples from 30 September to 1 October 2002 and deals with «Renewal

¹⁰⁹ Indeed, many countries in the subcontinent, after implementing intense privatisation policies and restricting the role of the State as much as possible, return to more active State policies (particularly in the social sphere) under pressure from public opinion. See: Bernardo Kliksberg, «L'administration publique en Amérique latine : Promesses, frustrations et nouveaux examens» [Public Administration in Latin America: Promises, Frustrations and Re-examination], *International Review of Administrative Sciences*, 2005/2, vol. 71, p. 327-345 [consulted online: <https://www.cairn.info/revue-internationale-des-sciences-administratives-2005-2-page-327.html>].

of welfare and general interest policies. Public institutions, regulated markets, social economy». Once again, the topic is meant to be transversal, and it includes a political dimension that is expected to meet the concerns of the congress participants. 570 participants from 23 countries are present at the opening of the congress, which is attended by, among others, the Head of Cabinet of the President of the European Commission.

4.3. Research Activities

4.3.1. Public Economy Research

The composition of the commission that oversees research in the public economy reflects, quite logically, the internationalisation that the organisation experienced at the turn of the century. While Japan used to be the only non-European country represented among the thirty or so specialists (economists and legal experts) who make up the Public Services/Public Enterprises commission, the commission is gradually opening up to Canada, Argentina and Turkey (which now has a national section). Nevertheless, it still has members from countries without a section, such as the Netherlands and, later, Switzerland. In 1997, the «Regulation versus Public Ownership» working group begins its work to carry out a comparative analysis (combining theoretical research and sectoral or national examples) on the paradigm shift from the 'classical' public enterprise to the regulated (private) enterprise. The work culminates in the publication of a special issue of the *Annals* in 1999¹¹⁰.

From 1999 onwards, the commission is involved in supporting research carried out by CIRIEC and the European Centre of Enterprises with Public Participation and Enterprises of General Economic Interest (CEEP): «Competitive tendering of public services or provision by public enterprises?» Commissioned by the European Union, it is carried out under Article 16 of the Amsterdam Treaty (see general economic background) and focuses on the conditions for the provision of services of general economic interest (SGEI). On the one hand, the aim of the study is to compare the advantages and disadvantages of tendering for these services (and thus, possibly, privatising them) with those of providing them through a public undertaking, and on the other hand, to devise criteria for the tendering out of public services and to propose public policy recommendations in this area. The topicality of the subject, its importance for the defence of public service missions and the rapid evolution of public procurement practices make it necessary to disseminate the results of the work quickly. They are therefore the subject of a special issue of the *Annals*¹¹¹ in 2003 and are



110 Helmut Cox (dir.), *Regulation versus Public Property – A Comparative Analysis*, AEPSC/APCE, 1999, Vol. 70, n° 2 (special issue), 207 p.

111 *The Question of Competitive Tendering of Public Services in the European Union*, AEPSC/APCE, 2003, Vol. 74, n° 4, 182 p. (special issue).

presented at an international colloquium organised in Brussels on 25 April of the same year under the challenging title «Public services to the highest bidder». This event, which is attended by a representative of the European Commission's Market DG, brings together some one hundred legal and economic experts. They discuss the European Commission's intention to impose competitive tendering for any service that a public authority (of any kind) wishes to entrust to a structure outside its administration. Because of its very positive effects, particularly in terms of attracting an unusual audience, this colloquium proves to be a very effective means of disseminating CIRIEC's work, which will be used in the future.

4.3.2. Social and Cooperative Economy Research

Chaired by José Luis Monzón Campos, the international scientific commission on the social and cooperative economy brings together some twenty researchers. Like its counterpart dedicated to the public economy, this commission has increased its non-European representation, as Turkey and Venezuela joined Canada during this period. It also welcomes specialists from countries that are not members of CIRIEC (Denmark, Norway, United Kingdom).

It supervises the work of the working group which, from 1997 to 2000, under the co-ordination of Daniel Côté (director of the *Centre de gestion des coopératives* [Cooperative Management Centre] of HEC - École des hautes études commerciales - in Montreal), studies the question of «Cooperative Holdings and other social economy groups». By analysing mainly cases from the agri-food and financial sectors, the aim is to highlight the strategies and behaviours developed by cooperative groupings to face the challenges of globalisation (and increased competition) and technological revolutions¹¹².

In spring 2001, a new working group is created under the coordination of Rafael Chaves (University of Valencia, Spain), Jean-Yves Manoa (University of Paris I, France) and Robert Schediwy (University of Kuopio, Finland and CIRIEC-Austria). Its purpose is a theoretical and empirical study of the role of management in social economy enterprises and of the relationship between managers and directors. The topic chosen is highly strategic in that it accompanies the political reflection underway within the European Union with a view to the creation of a European Cooperative Statute, adopted by the Council of Ministers of the European Union in July 2003. The results of the research provide material for three special issues (in English, Spanish and French) published in 2004, respectively in the *Annals* and in the journals of the Spanish and Canadian sections of CIRIEC¹¹³.

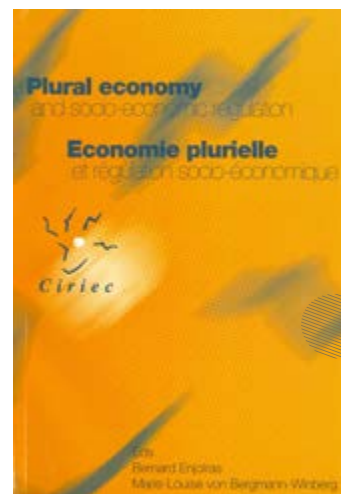
112 The results of this working group are published in: Daniel Côté (dir.), *Les holdings coopératifs. Evolution ou transformation définitive ?* [Cooperative Holdings. Evolution or permanent transformation?], Paris-Brussels, De Boeck Université, Coll. *Ouvertures Economiques*, 2001, 413 p.

113 *Governance and Management in the Social economy*, AEPSC/APCE, 2004, vol 75, n°1 (special issue), 166 p.; *Gobierno, democracia y directivos en las empresas cooperativas*, *Revista de economía pública, social y cooperativa*, 2004, n° 48 (special issue); *Gouvernement et management en économie sociale*, *Economie et solidarités*, 2004, vol 35, n° 1-2 (special issue), 239 p.

4.3.3. Transversal Working Group

The transversal working group is set up in the wake of CIRIEC's 50th anniversary to study the relationships (complementarity, substitutability, competition, etc.) between the various organisations (for-profit and non-profit, public and private) that provide services of social and general interest. This work requires the definition of various concepts (general interest, social services, solidarity perimeters, etc.), a particularly tricky task insofar as these vary according to language (the working group conducts its work in French, English and German), culture and scientific disciplines. It is therefore a particularly complicated project. While the aim is to favour a scientific approach by adopting a multidisciplinary methodology (combining economics, law, sociology and political science), the study also intends to make room for concrete illustrations and empirical data. We thus witness once again the concern not to cut ourselves off from the field actors who make up part of CIRIEC's membership.

Although this ambitious project is met with enthusiasm by most of the members of the International Scientific Council, it also gives rise to certain concerns as to its unprecedented scope and proves, in practice, to be difficult to implement. The ISC therefore decides to proceed in stages and to set up a preliminary working group (for two years). Its mission is to 'untangle' this complex issue, initially by favouring a scientific approach, and to carry out a 'radioscopy' of the various types of organisations pursuing the general interest in the various sectors, the services offered and the relations existing between them¹¹⁴. The functioning of the working group also turns out to be more difficult than expected. The project was initially submitted by the French-Norwegian Bernard Enjolras (Institute for Social Research - Oslo) and the Swede Filip Wijkström (Stockholm School of Economics), both researchers in social economy. In order to guarantee a balance between the two sides of the general interest economy, the latter is finally chosen as coordinator alongside a researcher in public economics, Olivier Saint-Martin (University of Rouen). Six months later, when the Swede resigns from this mission, his compatriot Marie-Louise von Bergmann-Winberg (Mid Sweden University) replaces him. The kick-off meeting takes place in April 1999, with the aim of publishing the first results for the 2002 congress. However, the diversity of competences is an obstacle to the choice of a common line and thus to the coherence between the various contributions. Moreover, the balance between the two economic sectors is difficult to achieve. This is partly due to the fact that researchers in the social economy have often had to deal with issues affecting the public economy (State, regulation, supervision), while the reverse is not necessarily true, which requires specialists in the public economy to become familiar with the specificities of the



social and cooperative economy. The fear of over-representation of the latter sector is further reinforced by the opening up of the coordinating tandem to Bernard Enjolras (Institute for Social Research - Oslo), because of his leading role in the work of the working group. However, these difficulties do not prevent the production of several contributions, a selection of which is published in the form of a bilingual publication for the Naples congress¹¹⁵.

Coordinated by Bernard Enjolras (under the supervision of the International Scientific Council), a new cross-disciplinary and multidisciplinary working group is set up in 2003 to work on a more operational research programme: «Governance regimes and general interest in the field of social and health services». The result is a dozen or so contributions published in the form of working papers, most of which are included in a collective work in French published in 2008¹¹⁶. Combining theoretical and empirical approaches and presenting diversified angles (economic, political, sociological), it offers insights at national (Belgium, Italy, France, Quebec, United Kingdom, Slovenia and Venezuela), territorial or sectoral levels, while highlighting common elements.

4.3.4. Research for third parties

At the turn of the millennium, CIRIEC International undertakes several studies or research projects aimed at providing the European Commission with scientific elements that could be used to define its policy or to legislate in the field of public or social economy.

For example, it is selected in the call for tenders issued by DG V (Employment, Industrial Relations and Social Affairs) in the framework of a pilot action launched by the European Commission («Third System and Employment»). This extensive research, planned to last almost two years, is coordinated by Bernard Thiry and Jacques Defourny. Its aim is to draw up an inventory of the social economy throughout the European Union and, on the basis of this inventory, to identify the positive factors and obstacles to the development of the third system. A first study carried out by some twenty international specialists (from each of the Member States) aims to provide an inventory of significant research on the third system, of the various structures active in this field and of existing public policies at national level. A smaller group of seven experts (from Belgium, France, Germany, Italy, Sweden and the United Kingdom) then confronts theoretical and conceptual data with the reality on the ground and with public policies, with the aim of providing recommendations to support the contributions of the social economy to employment.

¹¹⁵ Bernard Enjolras & Marie-Louise von Bergmann-Winberg, *Plural Economy and socio-economic regulation / Économie plurielle et régulation socio-économique*, (Liège), CIRIEC, 2002, 208 p.

¹¹⁶ Bernard Enjolras (dir.), *Gouvernance et intérêt général dans les services sociaux et de santé*, Brussels-Bern-Berlin-Frankfurt am Main-New York-Oxford-Vienna, Éd. Peter Lang, Coll. *Économie sociale & économie publique*, n° 1, 2008. 265 p.

¹¹⁴ CIRIEC archives, Minutes of the meeting of the International Scientific Council. Paris, 12 September 1998, p. 2-3.

This project constitutes a major scientific advance and further consolidates CIRIEC's reputation: the statistical data gathered makes it possible to carry out a radiography of the social economy at Community level, but also within each country and to determine the weight of its various components in terms of employment. The results (published in 2000 and 2001 in three books)¹¹⁷ show the growing role played by third system organisations (cooperatives, mutual societies, associations) in creating and preserving jobs, but also in correcting serious economic and social inequalities. Furthermore, the analysis provided on the health of the third system (emerging or declining activities) and on the instruments likely to help its development, ensures that the European Union takes better account of the role of the social economy in terms of innovation, job creation and social cohesion. Finally, the theoretical reflection and the confrontation of various conceptions and approaches of the social economy carried out by the second group also constitute a significant contribution to the scientific literature on the sector.

As mentioned above, another application is submitted to DG V «Social Affairs», but this time in the field of the public economy. This is a joint CIRIEC-CEEP project, which is part of the ongoing collaboration between the two organisations, which began in 1999, on the competitive tendering of public services. Its objective is to organise an international seminar in Brussels in 2001 on the topic «Conditions for the provision of services of general economic interest in the context of the implementation of the new Article 16 of the Treaty on European Union». A coordination committee is set up headed by Helmut Cox (chairman of the CIRIEC Public Services/Public Enterprises commission) and Jacques Fournier (chairman of the CEEP Public Services Steering Committee). Four working groups are set up to study the regulation of services of general economic interest, their financing, the evaluation of their performance and the best practices that can be shared; these issues are addressed in the sectors of water and energy, telecoms, transport, banking and postal services and public broadcasting. They consider the inevitable developments in SGEIs and the consequences that the application of Article 16 might have on their production and provision. The four resulting synthesis reports confirm the important role played by SGEIs in promoting social and territorial



cohesion. Published in French, English and German¹¹⁸, they are presented at an international seminar held in Brussels in mid-May 2001, where 150 participants from some fifteen European countries discussed ways of improving the organisation of the production and delivery of SGEIs. Among the proposals are the creation of a European observatory, the strengthening of the States' role in defining the missions and methods of financing SGEIs and the strengthening of their legal security.



The study «Co-operative Entrepreneurship in Europe 2000» is carried out at the request of DG XXIII (Social Economy Unit). CIRIEC International is the official promoter of this research carried out with six Italian partners (four cooperative federations, the Istituto L. Luzzatti and the Italian section). The aim is to provide the European Commission with elements that could help it to define the orientations of its policy towards cooperatives and to publish its *White Paper on cooperative entrepreneurship*. The results of this work are presented at an international conference organised in Bologna in late 1998, which highlights the cooperative economy and emphasises its modernity and dynamism. 500 participants from all over the European Union attend the conference, which is honoured by the presence of the President of the Italian Republic (Oscar Luigi Scalfaro), the

European Commissioner for Energy (Christos Papoutsis) and the Director General of DG XXIII (Guy Crauser). The proceedings are published in English, French and Italian¹¹⁹.

In 2003, CIRIEC carries out a study for the European Commission (DG Regio) on the contributions of services of general interest (SGI) to economic, social and territorial cohesion. It constitutes complementary research to DG Market's annual reports on the functioning of the internal market and is intended to provide elements for Commissioner Barnier to draft his third report on economic and social cohesion. The evaluation is both sectoral (energy, post, telecommunications and transport) and horizontal (a series of criteria for determining the contribution of

118 *Les services d'intérêt économique général en Europe : régulation, financement, évaluation, bonnes pratiques*, Brussels, CIRIEC-CEEP, 2000, 250 p. / *Services of General Economic Interest in Europe: Regulation, Financing, Evaluation, Good Practices*, Brussels, CIRIEC-CEEP, 2000, 244 p. / *Dienstleistungen von allgemeinem wirtschaftlichem Interesse in Europa: Regulierung, Finanzierung, Evaluierung, vorbildliche Praktiken*, Brussels, CIRIEC-CEEP, 2000, 256 p.

119 *L'entrepreneuriat coopératif dans l'Europe de l'an 2000 : actes*, Bologne, 30 novembre - 1er décembre 1998, Liège-Roma, CIRIEC-Istituto Italiano di Studi Cooperativi «Luigi Luzzatti», 1999, 223 p. / *Entrepreneurship and Cooperatives in Europe 2000 : Proceedings*, Bologna, 30 November - 1st December 1998, Liège-Roma, CIRIEC-Istituto Italiano di Studi Cooperativi «Luigi Luzzatti», 1999, 207 p. / *L'imprenditorialità cooperativa nell'Europa del 2000 : Conferenza Internazionale*, Bologna 30 novembre-1 dicembre 1998, Liège-Roma, CIRIEC-Istituto Italiano di Studi Cooperativi «Luigi Luzzatti», 1999, 236 p.

117 *Les entreprises et organisations du troisième système : un enjeu stratégique pour l'emploi*, Liège, CIRIEC, 2000, 144 p. / CIRIEC, *The Enterprises and Organizations of the Third System : a Strategic Challenge for Employment*, Liège, CIRIEC, 2000, 136 p. and CIRIEC, *The Enterprises and Organizations of the Third System in the European Union / Les entreprises et organisations du troisième système dans l'Union européenne*, Liège, CIRIEC, 2001, 358 p.

SGIs to cohesion) and results in a final report in 2005. Its conclusions stress the essential role of SGIs in the functioning of the economy and therefore the need to give them priority over competition rules. They recommend that the EU should encourage Member States to support SGIs in order to improve their efficiency. Finally, they advocate the enactment of a specific directive on European services of general interest.

Further international research is carried out with the support of companies: this is the case of the study initiated and coordinated by Daniel Côté, aimed at providing an overview of cooperative banks throughout the world. Financed by the Mouvement Desjardins (Canada), by DG Bank (Germany) and by two Belgian cooperative banks (via the *Fondation pour l'enseignement de la coopération*), this study culminates, at the end of 1998, in a report entitled *Profil des institutions bancaires coopératives dans le monde*¹²⁰.

4.4. Editorial Policy

4.4.1. Refocusing editorial policy

CIRIEC's editorial policy, which was already broadened in the mid-1990s, becomes even more diversified in the years that follow: this situation is a direct result of the strengthening of internal scientific activities and research for third parties. Indeed, as we have seen, the results of the work of the commissions and working groups almost systematically result in one or more publications. Thus, between 1997 and 2003, nearly fifteen scientific publications are issued, not counting the various translations.

The commemoration of CIRIEC's 50th anniversary gives rise to two publications: as mentioned above, a collective scientific publication examines the evolution of the concept of general interest in various countries (*Structural Changes and General Interest*). Published in three languages (French, German, English)¹²¹, the second is of a historical nature: in *1947-1997. 50 years in the Life of CIRIEC*, Yvonne Gélard, long-time assistant director, retraces half a century of CIRIEC's history with a great deal of rigour, but also verve, and evokes its key figures.

Faced with this multiplication of publications and the significant costs they entail (in terms of publication,



120 Daniel Côté, Martine Vézina, Micheline Tétrault et alii, *Profil des institutions bancaires coopératives dans le monde 1998* [Profile of cooperative banking institutions in the world 1998], Montreal-Quebec, École des hautes études commerciales-Centre de gestion des coopératives, 1998, 214 p.

121 Yvonne Gélard, *1947-1997. 50 ans de vie du CIRIEC*, Liège, CIRIEC, 1997, 69 p. / Yvonne Gélard, *1947-1997. 50 Jahre IFIG*, Liège, CIRIEC, 1997, 75 p. / Yvonne Gélard, *1947-1997. 50 Years in the Life of CIRIEC*, Liège, Ciriec, 1997, 68p.

translation, etc.), the International Scientific Council decides in 1998 to rationalise CIRIEC's publications¹²². The publication of collective works requires the synchronisation of the various contributions, which can have perverse effects: either excessive publication deadlines (with a risk of obsolescence of the results by the time they are published), or the publication of texts that are not entirely complete (with a corresponding drop in the scientific quality of the whole). The phenomenon is accentuated by the fact that some working groups forbid their members to publish articles in scientific journals until the results of their work have been officially published. To counter this phenomenon, it is decided to make greater use of the *Annals* or the collection of Working Papers to disseminate partial results and to publish a book only once the scientific reflection has been completed.

4.4.2. Annals of Public, Social and Cooperative Economy

Two years after the transfer of the *Annals* to the English publishing house Blackwell Publishers, the situation of CIRIEC's scientific journal remains worrying: the subscription price needs to be raised to cover the increase in production and mailing costs and, in the highly competitive market of scientific journals, it is struggling to maintain a constant readership despite CIRIEC's increased visibility and the publicity efforts made by the new publisher (targeted campaigns, promotional offers, etc.) At its meeting in Cologne in January 1997, the International Board confirms the specific orientation of the journal (which has remained unchanged since its creation by Edgard Milhaud almost nine decades earlier): namely, a treatment of topics of interest to CIRIEC members that is both scientific and non-technical. It is therefore necessary to improve the relevance of the articles to the members, to adopt a more transversal treatment (between the public and social economy) of the subjects addressed and to intensify the links with the work of CIRIEC's scientific bodies. The objective is that these bodies should get into the habit of publishing their research results in the *Annals*.

In concrete terms, this translates into a simplification of the editorial structure: the two positions of editors-in-chief (representing the two sides of the general interest economy) are abolished; editorial management is now ensured by the review's director, the editorial board and a management board reduced from six to four associate editors, including the presidents of the ISC and the two international scientific commissions. They are responsible for liaising with their respective bodies. These new arrangements mean a change in working habits both for the management board and for members of working groups wishing to propose an article to the review. Indeed, the former is obliged to extend its article selection criteria to include considerations beyond the sole academic criterion, while the latter must come closer to the academic criteria in terms of scientific quality.

122 CIRIEC archives, Minutes of the International Scientific Council meeting, Cologne, 6 May 1998, p.4-5.

However, not all CIRIEC members share the same view on the role of the *Annals*: because of their cost, some question their very purpose. Among the criticisms levelled at the review are the lack of room it gives to the activities of the national sections and the fact that it operates «in isolation», with articles written for the same small group of scientists. The Austrian section would like to transform the review into a kind of bulletin that would provide an overview and/or summary of the state of research in CIRIEC's fields of interest and reproduce some of the articles that have appeared in the national sections' journals¹²³. While the Board dismisses this proposal on the grounds that it is contrary to the contract signed with the publisher and that the scientific nature of the *Annals* is their very justification, it recognises the need to strengthen collaboration with the national sections and to review the content of the articles so as to make them less technical (and therefore more suitable for practitioners)¹²⁴. However, this last decision is not followed up, as the *Annals* have become a distinctly scientific review over the years, the strategy being to use them as CIRIEC's main showcase with researchers. At the same meeting, Fabienne Fecher, professor at the University of Liège, specialising in the social and mutual economy and in the performance of the health care sector, is appointed deputy director of the *Annals*. She relieves Bernard Thiry - whose recent appointment as president of Forem (the Walloon Region's public service for training and employment) has reduced his availability - of part of the day-to-day management of the review. A year later, she becomes its editor-in-chief¹²⁵.

The turn of the millennium confirms the validity of the measures implemented over the last few years. An internal evaluation carried out in 2003 finds that the quality of the articles has improved, as has the balance they present between the public economy and the social and cooperative economy. Moreover, the constant difficulties that Edgard Milhaud and his successors had in providing content for the *Annals* are now entirely a thing of the past. At the end of the 1990s, the review receives such a large number of submissions that it can afford the luxury of accepting only one third of them on average¹²⁶. The *Annals* are a fast-growing academic review, as evidenced by their increased circulation. In 2002, the number of subscriptions exceeds the symbolic 1000 mark, a result not achieved for more than 15 years. This is mainly attributable to Blackwell's policy of distributing the review electronically with consortia or in the form of 'subscription packages' offered to libraries. Most subscriptions are now online, with the *Annals* in printed form accounting for less than a third of subscriptions. Between 2001 and 2005, the annual number of articles downloaded increases fivefold, from

2878 to 15,163¹²⁷. Finally, the collaboration with the English publisher also proves to be financially profitable, since in 2003, when the contract is renewed for five years, it agrees to grant, on the one hand, an annual contribution intended to partially cover the costs of administrative meetings and management of the review and, on the other hand, royalties of 10%, with the guarantee of a minimum annual amount of €9,500 (€13,326 in 2021 prices). The challenge of raising the review has thus been amply met. A new challenge lies ahead: to get it listed by national agencies and in international scientific indexes such as the Institute for Scientific Information and the Social Sciences Citation Index. This will take almost two decades to achieve.

4.5. Evolution and activities of the national section

4.5.1. CIRIEC-Germany

The GÖW is probably one of the sections with the most diverse activities. It organises numerous conferences and round tables and the 22nd CIRIEC Congress (Cologne, 1998), publishes the *Zeitschrift für öffentliche Unternehmen* (ZögU) and various book series. The section has its own scientific council which proposes seminars or debates and initiates working groups studying various subjects (urban public transport, questions relating to the European Communities, missions and services of general interest, health and social affairs, new models of governance of public administration and public enterprises, etc.). The results of these studies enable the scientific council of GÖW to publish regular opinions or proposals with regard to German or European policy on public services: the place of savings banks and regional banks in the debate around competition and privatisation (1998), and the plea to maintain municipal services in the European Union (2004). Thus, the proposal to revise German municipal law, which puts municipal companies at a disadvantage vis-à-vis their competitors in the context of market liberalisation, attracts the attention of parliamentarians and the federal government. In 2001, Michaël Schöneich (Association of German Public Enterprises) succeeds Felix Zimmermann as chairman of the section.

4.5.2. CIRIEC-Argentina

In 1997, the Argentine section takes leave of Arturo Vainstok. Famous for his draft bill on co-operatives (1973), he served as president of the section for more than twenty years (1966-1988). A symposium on the evolution of the social economy in Argentina is held in his honour in Buenos Aires and Bahía Blanca. Two years later, CIRIEC-Argentina organises another prestigious event, the International Days of the Social Economy. In the early 2000s, the country is in the midst of a deep economic crisis, with inflation running at 350% and serious social consequences (three million people suddenly falling below the survival threshold). As the section is unable to pay its dues for 2003, its German, Austrian, Spanish and French counterparts exceptionally agree to pay a quarter each. This solidarity enables the section to weather the storm and to continue its activities.

123 CIRIEC archives, Minutes of the International Scientific Council meeting, Paris, 8 October 1999, p. 6-7; Minutes of the International Board meeting held in Liège, 26 November 1999, p. 7-9.

124 CIRIEC archives, Minutes of the International Board meeting held in Liège, *op. cit.*, p. 8.

125 CIRIEC archives, Minutes of the International Board meeting of CIRIEC held in Madrid on 23 October 2000, p. 6.

126 Éric Geerkens, *op. cit.*, p. 414.

127 *Ibidem*, p. 412.

The section carries out two important research projects in collaboration with the National University of La Plata: one on the types of services offered by mutual societies to their members, and the other on public service cooperatives, which appear to be a possible alternative in these times of crisis. It also re-launches a series of conferences on the social economy.

4.5.3. CIRIEC-Austria

The Austrian section, headed by Gerhard Greiner, makes an important contribution to CIRIEC's work, in particular through Walter Fremuth, director of the section's scientific council and vice-president of CIRIEC (1994-2000), and Stephan Orban, a member of the International Scientific Council. As part of the 50th anniversary of the International Centre, the Austrian section takes charge of the publication of the German version of the book *Structural Change and the Public Interest*¹²⁸, which is presented at the Vienna City Hall in the presence of the Minister of Finance, Rudolf Edlinger. In 2000, the section appoints a new president: Ferdinand Lacina, former Federal Minister for Economic Affairs and Transport, replaces Johann Hatzl, Deputy Mayor of Vienna. The section is very interested in the consequences of the enlargement of Europe, particularly with regard to the role of inter-municipal companies or the evolution of the discourse on services of general economic interest. 2002 is an important year as it marks the 50th anniversary of the section and the 10th anniversary of the Association of Municipal Enterprises in Austria. The event is marked by a jubilee congress in Vienna and Budapest on the topic «Strategies for the future of services of general economic interest», opened by the Austrian President, Thomas Klestil. In addition to its scientific quality, the event leaves a lasting impression with the memorable excursion it organises at the end of the congress: a round trip by rail (Vienna-Budapest) with dinner on board. In the same year, a book is published on the consequences of liberalisation and deregulation and on the role of regulators¹²⁹.



Logo of the Austrian section of CIRIEC in the early 2000s (CIRIEC collection)

4.5.4. CIRIEC-Belgium

The Belgian section gets off to a flying start with the organisation of the commemorations of the 50th anniversary of CIRIEC in 1997. The major investment involved for this exceptional event and the work required by the secretariat of the International Centre (which it has been providing since 1957) does not slow down its research activities. Between 1997 and 2002, the section carries out alone, or participates in, more than twenty contracts (on behalf of municipal authorities, the Walloon and federal governments or companies). It thus undertakes missions of evaluation (economic impact of Walloon airports, social real estate agencies, etc.), reflection (dangers of competition on health insurance, etc.), or accompaniment or implementation of projects (federal plan for sustainable mobility, project on local services, etc.). At the same time, it is involved in CIRIEC's working groups and commissions and occasionally participates in international scientific projects (updating of statistics on public enterprises in the Benelux countries, which are published every three years in CEEP's Statistical Annals). Following his appointment to the Belgian Commission for Electricity and Gas Regulation (CREG), Bernard Thiry takes leave as director of the Belgian section. He is replaced by a triumvirate consisting of Barbara Sak (deputy director), Fabienne Fecher (scientific director) and Henry-Jean Gathon, professor at the Faculty of Economics (director of research in transport economics).

4.5.5. CIRIEC-Canada

In adopting the 1997-2000 strategic action plan, CIRIEC-Canada takes a further step in the transformation it began in 1996 by opening up to all branches of the social economy and the public economy. In the light of the evolution of societies and the need to renew the vision of general interest, the section decides to «become a crossroads of expertise in research and training»¹³⁰. Four committees (research, training, dissemination and intervention) are set up to propose a collective activity plan. Finally, in 1999, a committee for the restructuring of the section is set up with the objective of reflecting in depth on its various bodies, as well as on the collaboration with English-speaking Canada and on the representation of the section towards external organisations (which results, among other things, in the creation of a new website and a new logo). In 1998, CIRIEC-Canada begins drafting the text of the *Call for a Social and Solidarity Economy*, which is widely distributed among social economy organisations and enterprises. At the same time, the section continues to be involved in the organisation of the annual ACFAS conference. The last years of the decade are devoted to the organisation of the 23rd International Congress (Montreal, June 2000), which constitutes an opportunity for the section in terms of its development and its visibility among its governmental and non-governmental partners. In 2000, Léopold Beaulieu, CEO of *Fondaction*, succeeds Benoît Lévesque as president of the section. The priority is to obtain structuring financial resources that will allow the section to carry out its many activities and to consolidate its review *Économie et solidarités*.

128 Lionel Monnier & Bernard Thiry, *Strukturwandel und Paradigmenwechsel in der öffentlichen, sozialen und genossenschaftlichen Wirtschaft im Kontext des Allgemeininteresses* [Structural change and paradigm shift in the public, social and cooperative economy in the context of the general interest], *Zeitschrift für Gemeinwirtschaft*, 1997, n°3-4 (special issue), 288 p.

129 Walter Fremuth & Christoph Parak, *Regulierung der Deregulierung von Infrastrukturmärkten* [Regulating the deregulation of infrastructure markets], Vienna, Manz, 2002, 310 p.

130 «CIRIEC-Canada. Activity Report 1998-1999» in CIRIEC, *Activity Reports. International Centre and National Sections*, [Liège], CIRIEC, June 2000, p. 70.

4.5.6. CIRIEC-Spain

As in the past, the section is characterised by its intense publishing activity, in its review and numerous books (nine between 2002 and 2004). It organises the *Jornadas de Investigadores de Economía Social y Cooperativa*, which bring together researchers in the social and cooperative economy every year. CIRIEC-Spain is also very actively involved in networking. In the early 2000s, it participates in the creation of the Mediterranean network of the social economy (bringing together representatives from Spain, France, Portugal, Italy and Greece) and establishes closer contacts with the Portuguese training network for the third sector, with the aim of organising an Iberian symposium on the cooperative movement and the social economy every two years. After Porto in 2001, Valencia hosts the second edition. In 2003, the section creates two



José Barea (CIRIEC-Spain collection)

new structures: the Interuniversity Network of Institutes and University Centres for Research in the Social Economy (RED ENUIES), which brings together 15 university centres under the coordination of the University of Valencia, and above all an Iberian-American Foundation for the Social Economy (FUNDIBES). Chaired by José Barea (former Minister of Social Security, then Secretary of State for the Budget and president of the scientific commission of CIRIEC-Spain) and coordinated by one of the directors of the section, José María Pérez de Uralde, this foundation aims to promote the development of the social economy in Latin America in various ways (creation of an award, publication of an annual report, networking, etc.).

4.5.7. CIRIEC-France

Apart from its active participation in the scientific work of the International Centre (Lionel Monnier is then President of the International Scientific Council), CIRIEC-France essentially develops its activities by organising meetings and symposiums: a meeting on the mutations of the public economy and the social economy (December 1997), «At the crossroads of the public economy and the social economy» (March 1999), «Does the social and solidarity economy provide a new employment model in Europe?» (June 2000), «Public services and services of general interest; a first critical assessment of privatisations: case studies and perspectives» (October 2001), a seminar on the enlargement of the European Union during the European Social Forum in Saint-Denis (November 2003), etc. In 2000, Jacques Fournier, who had become president of CIRIEC International, asks to be replaced as president of the section: after a one-year interim by Pierre Vionnet, director general of the *Organisme commun des institutions de rente et de prévoyance* (OCIRP, Common organisation of pension and provident institutions), Gérard Delfau, senator for the Hérault region and founder, with Jacques Fournier, of the association *Promouvoir le service public* (Promoting Public Service), finally takes over.

4.5.8. CIRIEC-Italy



CIRIEC-Italy journal

Like in Belgium, research carried out for third parties (regional, national or even international bodies or companies such as the European Commission, various ministries, the National Research Council, or Italian cities, provinces or regions) is an important part of the Italian section's activity. The topics dealt with show the diversity of its field of action: mapping of public authorities in the environment, standards and archives of Italian public bodies, research on educational day-care centres, on the development of undeclared work or on online subcontracting, Italian official statistical chronology, demand for employment in various sectors (entertainment, leather goods, textile companies, banking and financial services, etc.). The section also has an important publishing activity: in addition to its journal *Economia Pubblica* (directed by Giuseppe Boggetti), it manages three collections (one of a historical nature, one dedicated to the public sector and another to «studies and monographs»). Among the members of CIRIEC, it has the particularity of regularly carrying out studies of a historical nature (monographs on individual companies and a series of works dedicated to Milanese economic life and society). This specificity is undoubtedly linked to the large documentation and archive centre that it has within its walls. In 2002, it hosts the international CIRIEC congress in Naples on «The renewal of welfare and general interest policies».

4.5.9. CIRIEC-Japan

The two main activities of CIRIEC-Japan are the organisation of an annual congress and the presentation of two awards (CIRIEC-Japan Award and Onoe Award). In the autumn of 1998, Tokyo hosts the first meeting of the International Board organised in Asia. An international symposium on the international role of the euro is held in conjunction with the meeting. During this period, there is a change in the chairmanship of the section: Shunzo Nitta, professor at the University of Tokyo, held the position from 1996 until his death in 2002. His successor, Masu Uekusa, is also a member of the academic staff of the same university.

4.5.10. CIRIEC-Sweden

The Society for Co-operative Studies (Swedish Co-operative Network, Swedcoop) promotes research, information and development of the social economy in Sweden. Within this framework, the section is active in organising seminars and conferences. After experiencing major difficulties at the end of the 1990s, the section benefits from a development and support programme for the social economy decided by the Swedish government. This results in



collaborations, notably with the Swedish Research Council for Humanities and Social Sciences. The latter also financially supports the development of a database on cooperation and cooperative research. Starting in 1999, CIRIEC-Sweden published a journal *Social Economy - A Journal of Research and Co-operative Development*. In the spring of 2001, CIRIEC-Sweden is involved in the 7th European Social Economy Conference in Gävle (southern Sweden) with the aim of highlighting the benefits of the sector and identifying its challenges, as well as enabling an exchange of ideas and experiences.

4.6. International collaboration

As mentioned above, close relations had been established between CIRIEC and the European Centre of Enterprises with Public Participation and Enterprises of General Economic Interest (CEEP) on the occasion of the international research project carried out for the EU on the subject of services of general economic interest.

Collaboration with other European or international bodies (International Cooperative Alliance - ICA, European Confederation of Municipal Public Energy Distributors - CEDEC, European Liaison Committee for Services of General Interest - CELSIG, etc.) remains a constant commitment for CIRIEC. CIRIEC also attends and contributes to the main conferences and meetings (recurrent or not) organised at international level, such as the Expert Days on Associations and Foundations organised by DG XXIII, the conferences of the Confederation of Spanish Social Economy Enterprises (CEPES), the European Conferences of Local Public Enterprises, the European Social Economy Conferences and the ICA Research Conferences, as well as the Regional Academies on the Social and Solidarity Economy (ILO).

In 2001, at the initiative of President Jacques Fournier, the Board considers whether CIRIEC should be represented at the 1st World Social Forum in Porto Alegre (Brazil). Under the slogan «Another world is possible», this pluralist summit intends to bring together representatives of citizens' organisations from all over the world to reflect together on their concerns about globalisation and to propose alternatives. The event is intended as a social counterweight to the World Economic Forum, which brings together the top political, economic and financial circles in Davos (Switzerland) every year in January. The topics for discussion at Porto Alegre are therefore close to CIRIEC's concerns. Although the proposal is supported by several members of the International Board, it will not be put into practice. It is true that, logically enough, the Brazilian section of CIRIEC is the most appropriate to attend Porto Alegre for geographical reasons. However, it is a very young section and this is probably why the International Centre does not seize this interesting opportunity (at least in retrospect) to get closer to the anti-globalisation movement.

The regular contacts mentioned above obviously give CIRIEC a high profile and result in its growing recognition within the scientific world, as shown by the grouped request for membership submitted by several members of the European

Network of Researchers on Services of General Interest (RECSIG) to the scientific commission on public enterprises.



CHAPTER IV: STRATEGIC ACTION PLAN: THE VISIBILITY CHALLENGE (2004-2015)

1. Economic context

1.1. Bolkestein Directive and subprime crisis

In 2003, almost ten years after the General Agreement on Trade in Services (GATS), the European Union also intends to incorporate into its legislation measures aimed at opening up trade in services to free competition in member states. Presented by the European Commissioner for the Internal Market, the Dutchman Frits Bolkestein, the eponymous directive causes quite a stir as it is opposed by trade unions, anti-globalisation movements and part of the European left. Indeed, by giving precedence to the law of the country where companies have their headquarters over that where they provide their services, this directive encourages relocation and social dumping. Moreover, it affects sectors such as health, culture, temporary work, etc. Finally, in 2006, the directive is adopted after a series of amendments (notably the abandonment of the explicit reference to the country of origin, the removal of health care from the sectors covered and an exemption guaranteeing cultural diversity). The impact of the directive on services of general interest is however far from zero.

The marked recovery of the world economy that characterises the beginning



European protest against the Bolkestein directive
- Brussels, 5 June 2004 (IHOES - Fonds Centrale générale collection)

of the period does not last long: soaring oil prices and lagging European growth limit the recovery, which in retrospect turns out to be just a slight improvement before the big plunge. At the beginning of 2007, the subprime crisis erupts in the United States, which, with the bankruptcy of the powerful investment bank Lehman Brothers in the autumn of 2008, turns into a full-blown tornado sweeping the financial world. This is compounded by the bursting of the property bubble in many countries and a fall in purchasing power due to the rising cost of raw materials. The

entire world economy sinks into a recession that is reminiscent in many ways of the 'Great Depression' of the early 1930s: like the latter, the crisis breaks out in the world's largest economy and the explosion again occurs within the financial bastion. Like the 1929 crisis, it soon leaves no sector untouched and reaches exceptional proportions. The resulting social effects are unprecedented since the Second World War.

For several decades, the neo-liberal leitmotiv was to restrict state intervention as much as possible, but the crisis puts the State back in charge. Threatened with insolvency and hence bankruptcy, many banks in the United States and Europe appeal to the public authorities for help. To avoid the complete collapse of the entire world economy, the authorities adopt, depending on the case, various measures aimed at supporting the refinancing of banks, helping to recapitalise those in difficulty or setting up structures ('bad banks') enabling them to dispose of their 'rotten' assets. The economic shipwreck of 2008 also undermines the sacrosanct principle of market self-regulation, the credo of neoliberal thinking. The image of triumphant capitalism is dented, but in reality, the system will not be significantly shaken. At most, it is decided to redefine the rules of the markets and to impose a moralisation cure on finance. The strengthened role of the State is also marked (except in certain countries such as Greece) by the halt of privatisations which for several decades had been eroding the public sector. On the contrary, we witness a phenomenon of nationalisations aimed at safeguarding endangered companies and 're-municipalisations' aimed at providing decision-makers with better control over public service provision. The 'renaissance' of the public sector requires reflection on other ways of carrying out State action and, in a context marked by the exhaustion of finances and the introduction of new standards of public management, various questions arise, including good governance. As we shall see, these themes will therefore become part of CIRIEC's research agenda.

2010 sees a return to growth, marked by a recovery in world trade (led by China). However, the effects of the recovery are attenuated in many countries by measures taken to correct excessive private debt, notably in the United States, or by austerity policies adopted by governments in order to consolidate public finances, as is the case in Europe. The latter is confronted with the outbreak of the 'debt crisis', triggered by the markets' fear over the size of the Greek deficit. The risk of contagion to other lagging economies (Italy, Ireland, Portugal and Spain) and thus of a total collapse of the euro zone pushes the European Union and the International Monetary Fund (IMF) to refinance the Greek debt by imposing a ruthless austerity and reform plan. Germany makes its financial contribution to the rescue of the Eurozone conditional on the adoption of stronger budgetary discipline by all eurozone countries and imposes the diktat of strict compliance with the Stability and Growth Pact. Most of the eurozone countries then once again embark on a policy of public spending cuts. Not until several years later, when it becomes clear that austerity policies are not the only way out of the crisis, does the European Union give several countries more leeway to consolidate their public finances.

The recovery is confirmed at the turn of 2013-2014, especially in the United States and the United Kingdom, while it remains sluggish in the rest of Europe. Growth in emerging countries is held back by the slowdown in world trade and Japan struggles to emerge from the recession caused by the tsunami that devastated the archipelago in 2011 and resulted in the Fukushima nuclear disaster and the devastation of an entire region, as in Chernobyl a quarter of a century earlier.

The second half of the 2010s is also characterised by the 'uberisation' of society: technological developments facilitate the implementation of services that bring customers and 'sellers' into instant contact and, with it, the rapid development of a so-called 'collaborative' economy based on exchanges between individuals (BlaBlaCar, Airbnb, etc.), which is often compared (or even confused) with the social and solidarity economy¹³¹. The distinction between these two models, but also the opportunities and challenges they present to each other, will be the focus of several CIRIEC research projects.

1.2. The Crisis: an opportunity for the social economy?

The (near) decade of economic crisis is a glaring reminder of the inability of the traditional economy to regulate itself and the insufficient or inadequate response that private capitalist actors and the public sector (subject to a 'dry regime') can provide to fundamental problems and issues such as mass unemployment, social exclusion, health, education, sustainable growth, etc. At the same time, thanks to their characteristics (ethical values instead of a purely commercial rationale, stability of employment, a less hierarchical pay structure, a management style based more on cooperation and the idea of consensus, etc.), social economy organisations have proved to be less vulnerable to the crisis or have shown greater resilience. Their civic and territorial roots, as well as the trust they enjoy, make them less exposed to market downturns or public funding cuts. Moreover, during the crisis, many citizen initiatives emerged to compensate for private and public failures to meet social needs. Stimulated by some legislation introduced shortly before at regional, national or European level, they lead to a tremendous growth of the social economy, particularly in the social services sectors (social and professional integration)¹³² and, progressively, in approaches aimed at resource conservation and sustainable development. Furthermore, the United Nations' increased interest in the social and solidarity economy is marked in 2009 by the resolution proclaiming 2012 as the International Year of Cooperatives¹³³.

¹³¹ Even if their boundaries are sometimes porous, the two models are fundamentally different in their philosophy, their use of profits and their governance model, which are more rooted in the capitalist model for the former and in solidarity for the latter.

¹³² In Europe, the phenomenon was particularly marked in Greece, following the draconian austerity measures imposed on the country.

¹³³ United Nations, Resolution adopted by the General Assembly, 18 December 2009 - A/RES/64/136 (consulted online: https://www.un.org/en/ga/search/view_doc.asp?symbol=A/RES/64/136&Lang=E).

and by the creation in 2013 of the United Nations Inter-Agency Task Force on the Social and Solidarity Economy (UNTFSE).

At the same time, the social economy appears to be increasingly fragmented due to the multiplication and creativity of initiatives. Nevertheless, cooperatives and mutuals remain the strongest component in the social economy: in 2015, more than 179,000 cooperatives are active in the member states of the European Union in areas as varied as agriculture, retail, housing, solidarity finance, services and even industry. Together they represent some 4.7 million direct jobs. Mutual societies cover more than 407.5 million people, while associations employ more than 9 million workers in 2010¹³⁴.

The social economy is also attractive in other parts of the world, particularly in Latin America where a multitude of solidarity economy initiatives are developed (including the peace process in Colombia, which is partly based on social economy actors and cooperatives) and in Japan, where it offers original solutions to the country's twofold challenge of an ageing population and the desertification of rural areas (notably with the creation of new cooperatives aimed at reviving life in Fukushima).

Thus, it is increasingly clear that the social economy has been an effective firewall against the economic crisis and the crisis of the 'welfare state' and that it contributes to the creation of social capital, to the emergence of a more democratic and inclusive society, and to sustainable development. From now on, the social economy is among the actors put forward for a structural exit from the crisis. It is thus recognised in European society as a «pole of social utility, between the capitalist sector and the public sector, made up of a great plurality of actors, cooperatives, mutual societies, associations, foundations and other similar companies and organisations»¹³⁵. The popularity enjoyed by the social economy can be seen in the fact that it is increasingly taken into account by European governments (laws on the social economy adopted in Spain, Greece, Portugal and France) and by the European Union (recognition of the role of the social economy in the Toia report adopted in 2009 by the European Parliament; initiatives in favour of social entrepreneurship; satellite accounts for mutuals and cooperatives providing statistics for these social economy enterprises, etc.).

¹³⁴ José Luis Monzón & Rafael Chaves, *Recent evolutions of the social economy in the European Union*, Brussels, European Economic and Social Committee, 2016, p. 73-103.

The International Cooperative Alliance estimates that cooperatives currently employ some 280 million people worldwide, or 10% of the global workforce (see ACI website: <https://ica.coop/fr/node/10663> - most recent consultation on 25 Feb 2018).

¹³⁵ José Luis Monzón & Rafael Chaves, *The Social Economy in the European Union*, Brussels, European Economic and Social Committee, 2012, p. 102

In the public economy sector, the situation seems initially more unfavourable: successive waves of austerity have weakened the traditional type of public enterprises. Public services are now offered by companies of a much more diversified nature, leading to a profound transformation of the public economy. The public economy is experiencing an identity crisis, with some of its enterprises no longer recognising themselves as 'public'. However, in recent years it appears that not only have public enterprises managed to survive, but their role has often increased at local and even national level.

The subprime crisis is followed by a wave of nationalisations of financial institutions (banks, insurance companies, etc.), but also sometimes of industrial companies. At the same time, there is a revival of the local public economy. Thus, after having undergone waves of privatisations before 2008, public enterprises are again enjoying a certain credibility. Once again, this economic context will influence CIRIEC's research agenda, since it will attempt to determine whether we are witnessing a lasting return to increased State intervention in the economy or merely a temporary recourse, and to examine the new types of initiatives (combining public and private) that have emerged.

2. The Strategic Planning Operation

Created in the particular context of the aftermath of the Second World War, with the primary aim of ensuring the survival of its review, CIRIEC finds itself at a crossroads at the turn of the millennium: its scientific work has developed strongly in both quantitative and qualitative terms, the sustainability of the *Annals of Public, Social and Cooperative Economy* is assured and its scientific level has markedly improved. Finally, CIRIEC benefits from a network of scientific collaborators at global level who regularly participate in the research work carried out by the scientific commissions. Nevertheless, over the past six decades or so, its external environment has changed fundamentally. At the geopolitical level, the world has undergone huge changes that have produced a different vision of the world and of democracy. Globalisation has fundamentally transformed the economy. New social concerns have emerged (new forms of poverty, increasing social inequalities, social and geographical exclusions, etc.) and have resulted in new demands. The social economy and the public economy, CIRIEC's areas of interest, have been strongly impacted, as we have seen above, and by ricochet, research in the public and social economy has also undergone profound transformations: it has become internationalised and now meets new expectations. In 60 years, the trend has been reversed: the public economy, which used to be a field of study with academic career prospects, is now less synonymous with promotion and is therefore somewhat deserted by researchers. However, the demand for research on the public economy remains strong (it exceeds the supply): the sector benefits from solid institutionalisation, the field of study continues to expand. In the social economy, there is a growing interest among researchers and students (supply exceeds demand). However, the sector suffers from a lack of problematisation, visibility, statistical data and, more often than not, poor

funding. Moreover, research in the social economy is a highly competitive field, which manifests itself both in terms of theoretical approaches and in terms of cultural and linguistic diversity and pits networks and centres against each other.

In this totally new context, it is essential for an organisation such as CIRIEC to position itself and to think strategically about the topics that are likely to be of interest in the light of the expected evolution of society. Moreover, in general, academic research as a whole has undergone major changes: it is more international, it is experiencing a phenomenon of competition that is accompanied by a process of permanent evaluation of researchers and, by extension, a loss of freedom for the latter in terms of research choices.

It is therefore necessary to identify CIRIEC's weaknesses and to try to redress certain handicaps that it has not yet succeeded in overcoming (or insufficiently so). For example, it is struggling to capitalise on its assets and its visibility remains insufficient; the scientists with whom it works are over-solicited and the renewal and enlargement of its network remains problematic. Finally, there is the tricky issue of funding, which is largely correlated with the above findings. It is proving very difficult to increase income from membership fees. As for research contracts, they are becoming more difficult to obtain: they are now awarded through calls for tenders and have become increasingly competitive, requiring the rapid mobilisation of researchers, which is precisely one of CIRIEC's recurring weaknesses. Furthermore, the time allowed to conduct research is drastically reduced, from two to three years to six or even three to four months.

In 1998, at a meeting of the International Scientific Council, Benoît Lévesque points out that the time may be ripe to carry out a global reflection on CIRIEC's policy and its research strategy. He suggests that a report be drawn up to take stock of the work done over the past decade, analyse its impact and explore avenues for the future¹³⁶. In 2004, now president of the Scientific Council, he sets about drafting a note to launch a strategic planning exercise. The aim is to conduct a collective analysis over a two-year period in order to obtain a clear vision of the work done within CIRIEC and the framework in which it is carried out. The aim is to perform a kind of SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis.



Benoît Lévesque and Léopold Beaulieu
(Léopold Beaulieu collection)

Coordinated by the president of the ISC, the director and the deputy director of the International Centre, the operation is performed in four stages: first a survey, carried out by means of questionnaires to the national sections and scientific

bodies, collects the information necessary to draw up an internal and external diagnosis. This assessment is then widely discussed within the various bodies in order to draw up a strategic analysis specifying CIRIEC's missions and priorities. The third step consists in setting a series of (general and specific) objectives to be achieved. Finally, a medium- and long-term action plan is drawn up which determines the measures to be implemented and the resources to do so.

In June 2006, in conjunction with the 26th Congress of CIRIEC, a first synthesis document proposing a series of conclusions and operational recommendations is presented to the General Assembly in Istanbul¹³⁷. On the basis of the information gathered, it provides an in-depth analysis of CIRIEC. First of all, it shows the relevance of CIRIEC, almost 60 years after its creation, despite the complete transformation of the world in which it operates. Its strengths include its dual expertise in the social and public economy, its multidisciplinary and international character, the originality of its research fields (outside the mainstream), its reputation, the size and quality of its network of members, its flexibility in terms of organisation and the quality of its permanent secretariat. But the survey also points to a number of weaknesses: unclear research priorities and a choice of topics that is not always optimal, research cycles that are too long, insufficient dissemination of social economy research results (particularly in English), an absence of experts from Eastern Europe and Latin America (especially in the public economy), too little sense of belonging on the part of the researchers actively participating in the CIRIEC network, and finally inadequate use of information and communication technologies (notably its obsolete Internet site).

The note also provides an overview of the demand for research. In the field of the public economy, this concerns in particular the role of the State as guarantor of the general interest, alternative methods of providing services of general interest (SGI) and their evaluation, the evolution of public policies and their reforms, the new managerial needs of public enterprises, etc. For the social economy, the main issues are, among others, the study of its institutional and legal environment, its contribution to the general interest and democratisation, the analysis of national models and their comparison, the collection of reliable data and their evaluation, the elaboration of arguments regarding the State's interest in financing the social economy, the exploration of ways to do so, etc. From a cross-cutting perspective, the links between the social, public and private economies need to be examined.

The strategic operation has already resulted in a series of recommendations. Five priorities have been identified:

- 1° Boost CIRIEC's scientific activities: this objective requires a revision of the operating method of the scientific bodies. This means strengthening the supervisory role of the Scientific Council and the two commissions, so as to

¹³⁶ CIRIEC archives, Minutes of the International Scientific Council meeting, Cologne, 6 May 1998, p. 5.

¹³⁷ CIRIEC archives, *Opération de planification stratégique. Présentation à l'Assemblée générale du CIRIEC international* [Strategic Planning Operation. Presentation at the CIRIEC General Assembly]. Istanbul, 19 June 2006 [print-out of a power-point].

better integrate research topics into a general programme that takes into account developments in research, and to choose topics for their interest at societal level and their topicality (in particular to allow dissemination during scientific meetings). Secondly, the heads of companies and organisations should be more involved in the choice of topics and, finally, the exchange/debate function should be separated from the research function. Revitalisation also requires more international scientific events and a leading role in the setting up of monitoring bodies in the fields of the social economy and the public economy.

2° Set up a structure capable of responding to calls for tender and strengthen the secretariat.

3° Improve CIRIEC's visibility and the researchers' sense of belonging to its network: among the avenues explored are the creation of a membership status for researchers, the redefinition of the publication policy, the improvement of the website and the creation of an intranet accessible only to members, as well as the generalised use of the CIRIEC acronym (by all sections and on all documents emanating from the network).

4° Increase the international character of CIRIEC by working on less Eurocentric subjects, by developing more solidarity with emerging countries and by trying to enlarge the network to the new member states of the European Union.

5° Stimulate the visibility, readership and scientific recognition of the *Annals*: the two main lines of action for this goal are the commemoration of the 100th anniversary of the review (in 2008) and its indexation in the Social Sciences Citation Index (SSCI)¹³⁸.

Since the creation of CIRIEC, never before has such a thorough and ambitious process of introspection and analysis of the external environment been carried out. In this respect, the strategic planning operation constitutes an crucial stage in the history of the International Centre insofar as it dares to re-examine CIRIEC's primary missions, to question the means applied to respond to them and to propose courses of action. A formidable laboratory of ideas, it will be the occasion for a new dynamic and will mark the evolution of CIRIEC for more than a decade.

3. Strengthening the CIRIEC network

The network is one of CIRIEC's strengths: it is made up not only of the national sections and their members, but also of a large number of scientists who, depending on the country, act more or less independently of the sections. However, its expansion and renewal remain problematic: the scientists with whom CIRIEC works are over-solicited; the creation of new national sections runs up against administrative and financial obstacles and many of the existing

sections remain fragile and at the mercy of the economic or political situation in their country.

Moreover, although CIRIEC's international dimension and its presence on three continents constitute an undeniable asset at the scientific level, as does its coverage of all the fields of collective economy, the other side of the coin reveals various handicaps. These include, first of all, the heterogeneity between the sections, which mainly manifests:

- at the financial and administrative level: the reality experienced, for example, by the Austrian section (financially stable and with more than 100 members and a staff of about ten) is far removed from that of CIRIEC-Venezuela (which experiences recurrent financial difficulties, has only five members and no paid staff);
- in terms of focus: while CIRIEC aspires to have each of its sections develop activities in both the social and public economy, as we have seen, most of them have a preferred focal area or are closer to one of the two sectors;
- in terms of promotional policy towards the outside world: alongside CIRIEC's international review (the *Annals*), many sections have their own reviews; moreover, the latter all have their own website and logo, and their very name does not always make it possible to associate them with the International Centre (not to mention the fact that some CIRIEC sections also function as sections of other international organisations such as the CEEP, for example).

A second disadvantage is the lack of bilateral contacts and therefore of mutual knowledge between most sections. This is of course linked to the diversity of languages spoken in the countries where CIRIEC operates, but it is also the result of some sections' lack of financial means to travel, to physically attend the many meetings and establish new relationships.

This heterogeneity and lack of internal exchange prevents CIRIEC from having a coherent communication policy towards the outside world, both with public or private partners, who do not sufficiently identify the resources that the CIRIEC network can offer in terms of research, and with researchers, who find it difficult to understand the advantages of joining the network. This is why one of the priorities identified by the strategic planning exercise is to improve CIRIEC's visibility and the researchers' sense of belonging to its network.



CIRIEC logo from 2009 to 2015

Significant efforts are made in internal communication (via the newsletter) and external communication. These include a new look (new logo and graphic charter) and the development of new bilingual (French-English) promotional tools (leaflets, website). CIRIEC's image is enhanced by the more regular use of the acronym CIRIEC by the national

138 *Ibidem*.

sections and by the use of the same logo (with different colours) by some of them. As for the website, it provides a more complete presentation of the activities of the various sections (with references to their websites where appropriate) and a series of online resources. The aim is to make it a key reference point for the whole of the collective economy.

3.1. New national sections

One of the main obstacles to the creation of new national sections, as we have seen, is the question of finance. In 2004, a solidarity fund is set up to support countries in difficulty (especially in Latin America, Africa and the new members of the European Union). The fund is financed by willing national sections and its beneficiaries are existing sections or those in the process of being set up. They can call on it on a case-by-case basis, in particular to finance the travelling expenses of delegations to congresses. Six strong sections respond to the appeal (Austria, Belgium, Canada, France, Germany and Spain) and raise €3000 per year (enough to finance the travelling expenses of three to four people). Four years later, in view of the mixed results of the mechanism, it is decided that the fund should instead be used to cover travelling expenses to CIRIEC meetings, while the national section organising the congress is responsible for trying to find funding to ensure the participation of cash-strapped sections.

Contacts to encourage the creation of new sections continue at a steady pace. The Board sets as a priority to try to revive suspended sections (especially Portugal) and to open up to the countries of Central and Eastern Europe (CEECs) by trying to obtain European funding for this purpose.

The first objective is quickly met: the General Assembly held in Lyons on 28 September 2004 formalises the reinstatement of the *Centro de Estudos de Economia Pública e Social* (CEEPS) as the Portuguese section of CIRIEC, with Jorge de Sá (professor at the Universidade Técnica de Lisboa) as director and Luís Reto (president of the Instituto Superior de Ciências do Trabalho e da Empresa) as president. The section quickly gets back on track and organises an international seminar¹³⁹ in 2005, which is attended by the President of the Republic. In addition to regularly organising events (Annual Social Economy Meetings in 2010 and 2011; 5th Social Economy Research Conference in 2015 in Lisbon, 8th Iberian Symposium on Cooperativism and the Social Economy in 2016, etc.), it is also involved in setting up a national observatory of the social economy (OBESP). Its



Jorge de Sá at the 32nd CIRIEC Congress - Liège, 2018 (CIRIEC collection)

objective is to identify and study social economy organisations and to promote them to both policy makers and the general public. In 2016, the section adopts new statutes in order to better involve managers of enterprises.

Extensive negotiations are held with a view to re-launching a Slovenian section on the basis of the Chamber of Economy (Commerce and Industry) and the Research Institute headed by the former head of the section, Rado Bohinc. Unfortunately, this hope does not materialise. Nor does CIRIEC's long-held dream of establishing a section in the UK around the University of Greenwich and Professor David Hall, who heads the important Public Services International Research Unit (PSIRU) with links to the European Federation of Public Service Unions (EPSU).

At the same time, regular contacts are maintained in Central Europe (Czech Republic, Slovakia), North Africa (Tunisia, Morocco, Algeria) and even in Asia (Taiwan). But once again, Latin America is where the efforts prove to be most conclusive. It must be said that these efforts are carried out jointly by several sections (Argentina, Brazil, Canada, Spain and Venezuela) and are supported by the Ibero-American Foundation for the Social Economy in Latin America, created on the initiative of CIRIEC-Spain. Opportunities are identified in Costa Rica, Chile, Peru, Mexico, Bolivia, Uruguay and Colombia.



CIRIEC-Colombia journal

At the end of 2008, a Colombian section is founded. It is set up on the initiative of researchers in the social and cooperative economy from two universities (including Marietta Bucheli Gomez from the Pontificia Universidad Javeriana and Colombia Perez Munoz from the Universidad Cooperativa de Colombia), joined by three other members from the academic world, including Hernando Zabala Salazar (professor at the Universidad Luis Amigó in Medellín) who becomes the section's president. The section quickly becomes involved in the scientific activities of the International Centre and hosts an international seminar on the collective economy as a development vector in Bogotá in March 2012. In 2013, the section is legally formalised with the constitution of the Corporación CIRIEC-Colombia, whose first meeting is held on 30 April 2014. Since then, it has been involved, among other things, in the research projects of the Centre for Research and Cooperative Education supported by the government and has developed contacts with a view to opening up to the public sector. It has also organised various symposia and hosted the 8th Meeting of the Latin American Research Committee of the International Cooperative Alliance. The section is small (20 members in 2015) but dynamic (and therefore financially better off than most of its Latin American counterparts), and it has the ambition to set up a Colombian observatory of the social and solidarity economy. In addition, it plays an important role as an

¹³⁹ «Social Economy and Territorial Development» (Lisbon, May 2005).

intermediary on the subcontinent by promoting exchange with countries such as Chile, Uruguay, Costa Rica and Mexico.

In order to offset the (administrative and financial) burden of creating a new section, CIRIEC develops a new strategy in the early 2010s: signing bilateral agreements with members who do not have a national section in their country, with the aim of creating one within three years. MoUs are signed with Mexico and Costa Rica in 2011. However, as we will see in the next chapter, these two countries will not set up their own national sections until almost a decade later, mainly because of the difficulty of bringing together enough partners (companies, umbrella associations, foundations, trade unions, public administrations, etc.) to ensure sufficient stability and activity for the growth of a national section of CIRIEC.

The International Board and the Praesidium, at their respective meetings in Bogotá in March 2012 and Nicosia in June 2012, reiterate their willingness to divide the work of expanding and consolidating CIRIEC in the various continents more evenly among its members and to define clear mandates for doing so: the Portuguese, Spanish and Canadian sections are to continue their efforts in Latin America; Germany and Austria will concentrate on the countries of Central Europe, while France and Spain will strengthen their contacts in North Africa¹⁴⁰.

2008 is a good year for the expansion of CIRIEC's network, since a new member joins in addition to Colombia, but with a difference: exceptionally, it is not a national section as such, but a collective member, the Cypriot Labour Institute INEK-PEO. In 2012, it organises a seminar in Nicosia on the public and cooperative economy in the context of the economic crisis. Although CIRIEC's statutes provide for the possibility of accepting institutional members alongside the national sections, this occurrence remains quite rare. It will take several more years for it to develop, as we will see in the next chapter.

3.2. The scientific network

In order to revitalise the network of researchers and in accordance with the recommendations of the strategic planning operation, CIRIEC introduces a series of tools: a directory of researchers listed by field of work, an e-mail database, a mailing list providing real-time information on CIRIEC's current events by re-launching an internal newsletter for members, and the regular electronic distribution of information on CIRIEC's activities to more than 3,500 recipients. These tools are complementary to the systems developed previously, namely the strategic watch on research and the documentary platform Agora (see below). The evaluation of CIRIEC's added value for members is regularly discussed at the International Scientific Council throughout the period.

¹⁴⁰ CIRIEC archives, Minutes of the meeting of the International Board of CIRIEC, Bogotá, 29 March 2012, p. 4 and Minutes of the Praesidium meeting, 30 June 2012, Nicosia (Cyprus), p. 7.

The strategic operation reveals that one of the ways to strengthen the scientific network is to redefine its publication policy. Indeed, in order to attract new researchers, and particularly young scientists, it is necessary to guarantee the swift publication of their work, so that they can use it in their academic career. As we shall see, this is what CIRIEC will endeavour to do. On the one hand, it will strive to improve the communication of research results in its existing publications: the *Annals*, the various reviews of its national sections (more collaboration between them is encouraged) and the books of the CIRIEC collection (published by Peter Lang). In addition, it launches a new initiative: the digital publication of *working papers*.



CIRIEC meeting in Leipzig in 2008. First row, from left to right: Bernard Thiry, Barbara Sak, Wilhelm Georg Hanss, Leona Detiège, Erich Haider and Frank Schulz-Nieswandt (CIRIEC collection)

A specific strategy is also deployed towards young researchers to encourage them to take an interest in the public, social and cooperative economy and to join the CIRIEC network: on the initiative of Wilhelm-Georg Hanss, CEO of the Leipzig public transport companies (Germany) and president of CIRIEC International (2008-2012), the International Board decides at its December 2008 meeting to create a prize intended to reward the work of a young researcher on a topic of interest to CIRIEC and in connection with the themes of its congresses¹⁴¹.

Each national section may propose a candidate for the prize. The jury is chaired by Leona Detiège and is composed of the presidents of the scientific bodies (ISC and commissions) and the editor in chief of the *Annals*. The award is endowed with €10,000 and, logically, is named after the founder of CIRIEC: Edgard Milhaud¹⁴².

3.3. New initiatives: the setting up of Agora and the short-lived existence of the Research Themes Steering Committee (COTHER)

The strengthening of CIRIEC's network and its better connection to the business world are behind three new initiatives. The main one is the bi-annual organisation

¹⁴¹ CIRIEC archives, International Board of CIRIEC, Leipzig, 5 December 2008, p. 10. This award is financed within the framework of international congresses (and from their budget). The amount of the prize therefore varies from one congress to another.

¹⁴² Award winners: 2010 - Kristof De Witte (universities of Maastricht, Leuven and Amsterdam) for his thesis *On Analyzing Drinking Water Monopolies by Robust Non-Parametric Efficiency Estimations* (2010); 2012 - Anaïs Périlleux (university of Mons, Centre for European Research in Microfinance, Belgium) for her thesis *Governance and Growth of Cooperatives in Microfinance*.

of International Social Economy Research Conferences starting in 2007, but more on this later.

Agora or the Kiosk of the general interest and social economy is set up in June 2014 as an off-shoot of the strategic planning exercise. The aim of this initiative is to create an interactive database for researchers and experts. The Belgian section is



Agora logo

in charge of setting it up. Funded as a pilot project and action research by the Walloon Region and led by Christelle Pasquier, CIRIEC's librarian-documentalist, this knowledge platform aims to bring researchers together around three key elements: a directory of all the members of the CIRIEC network, a calendar (announcements of conferences, events, etc.), and a documentary research section fed by CIRIEC and the users themselves. It also offers a service for the conservation and processing of external archives¹⁴³.

Finally, the third initiative intends to strengthen contacts between scientists and practitioners. While the meetings of CIRIEC's scientific bodies originally brought together both academics and experts from member companies (in charge of human resources, infrastructure, investment policies, etc.), the practice has gradually been lost, resulting in less exchange and interaction between researchers and practitioners in CIRIEC. In 2015, the Research Themes Orientation Committee (COTHER) is set up to act as a relay between CIRIEC's bodies (governing body and International Scientific Council) and the managers of its affiliated enterprises. Its objective is to identify the needs of managers and, on this basis, to suggest research topics to the scientific commissions. The idea is to provide scientific knowledge that is more oriented towards (and accessible to) practitioners in the public, social and cooperative economy. Among the avenues of reflection envisaged are: the contribution of public, social and cooperative housing to urban social inclusion; the dangers of free trade agreements (CETA, TTIP) for the provision of services of general interest (SGIs); the financing of public-private partnerships; the importance of the public sector in infrastructure investments; etc. Chaired by Erich Haider, CEO of the public enterprises of Linz (Austria) and vice-president of CIRIEC International, COTHER brings together a dozen managers and very quickly an online forum is set up. However, the committee is short-lived: in 2016, it is abandoned following the observation that it is difficult to put managers, who have little time available, in direct contact with scientists who do not consult the platform. Furthermore, a call for research on social housing (for an amount of €30,000), widely distributed by CIRIEC, fails to attract any applicants, as the deadline of a few months is deemed too short and the report has to be written in German. This failure again highlights CIRIEC's growing difficulty in successfully positioning itself in the competitive field of research tenders.

4. Changes in the way CIRIEC operates and new challenges

4.1. Praesidium Reshuffle

In 2004, the Praesidium welcomes a new member, Erich Haider, Vice-Governor of Upper Austria. He succeeds Walther Fremuth, who had been a member for almost ten years. Leona Detiège is elected president of CIRIEC International¹⁴⁴, a position she holds concurrently with that of president of the Belgian section. In 2006, the Council decides to reappoint her for another term, considering that two years is too short a period to allow a president to fully participate in the development of CIRIEC International. She is assisted by four vice-presidents (Leopold Beaulieu, Jacques Fournier, Wilhelm-Georg Hanss and Massimo Pinchera) and four members: the Austrian Erich Haider, the Turk Burhan Aykaç, the Swede Katarina Grut (succeeded in 2006 by Lisa Fröbel, president of CIRIEC-Sweden and director of Serus) and the Japanese Masatomi Funaba (or his deputy Hajime Imamura). After his death in 2007, Funaba is succeeded by Matsuyo Makino, who in turn is succeeded one year later by Hajime Imamura, professor at the University of Tokyo and vice-president for international relations at CIRIEC-Japan.

In 2008, Wilhelm-Georg Hanss, CEO of *Leipziger Verkehrsbetriebe* (Leipzig Public Transport), succeeds Leona Detiège as CIRIEC's president (a position he will hold for two successive terms). In accordance with the rotation principle, José Luis Monzón hands over the position of honorary president to her and becomes



Alain Arnaud and Léopold Beaulieu at a CIRIEC meeting - Argentina, 2014 (CIRIEC collection)

vice-president. The longest serving vice-president (Léopold Beaulieu) hands over to Erich Haider. The Praesidium is also extended to include other sections that have paid their dues. The Canadian member becomes a 'ordinary' member alongside his Japanese, Swedish and Portuguese colleagues: Luis Reto (president of the *Instituto Superior de Ciências do Trabalho e da Empresa* and president of CIRIEC-Portugal) joins the body.

¹⁴³ Since 2015, it has been the repository of the electronic archives of CELSIG (European Liaison Committee on Services of General Interest).

¹⁴⁴ CIRIEC archives, Minutes of the General Assembly of CIRIEC. Lyons, 28 September 2004, p. 6.

Two years later and for the first time in CIRIEC's history, representatives of the Japanese and Portuguese sections are appointed as vice-presidents, namely Hajime Imamura and Jorge de Sá (professor at the Technical University of Lisbon), alongside Léopold Beaulieu and Lisa Fröbel, presidents of CIRIEC-Canada and CIRIEC-Sweden. This change comes at the express request of the director to review the composition of the Praesidium, ensuring that all continents are represented as vice-presidents. This is an attempt to offset the excessive Eurocentrism of CIRIEC. Still, this new measure does not actually solve the problem of the Latin American sections, since membership of this body is conditional on the payment of a normal membership fee (i.e. around €3500), which is far beyond their financial capacity. Only in 2017 will the subcontinent be represented in the Praesidium by an Argentinian representative.

In 2012, an unprecedented situation arises with three candidates for the presidency: Alain Arnaud (France), Eric Haider (Austria) and Léopold Beaulieu (Canada). As no consensus is found after two Board meetings, one in Nicosia in June and the other in Vienna in September (on the eve of the General Assembly which is supposed to endorse the composition of the Praesidium for the next two years), a crisis meeting is held between the director and the former presidents of CIRIEC (L. Detiège, J. Fournier, J.L. Monzón and M. Pinchera). At the end of this meeting and after discussion with the incumbent president, Léopold Beaulieu is chosen as the candidate, thereby becoming the first non-European president of CIRIEC. However, discussions are already underway for 2014, as it is already certain that the Canadian, who will have reached retirement age by then, will not be seeking a second term. By way of a *gentlemen's agreement*, Erich Haider is chosen as his prospective successor and, in the meantime, will become honorary president, as Wilhelm-Georg Hanss has resigned from the position.

At the May 2014 Board meeting, the French section unexpectedly proposes Alain Arnaud as its candidate for the presidency. In order to find a consensual solution and avoid a new crisis, Austria withdraws the candidature of its representative. Alain Arnaud therefore becomes the 13rd president of CIRIEC International. Erich Haider is appointed vice-president, as well as Jorge de Sá (Portugal), Luis Monzón (Spain) and Hajime Imamura (Japan). The first four will be re-elected for a further term in the 2016 statutory elections, while the latter will hand over the position of vice-president to Leona Detiège (Belgium).

4.2. The Board

The International Board is responsible for the general orientation of CIRIEC's work in the field of international research and congresses and meets at least twice a year. Its members are elected by the General Assembly on the proposal of the national sections. The latter may propose a maximum of five full members and the same number of substitute members. In addition, a maximum of five members may be chosen by the Board from among the other members of CIRIEC. A revision of the statutes is decided on the occasion of the General

Assembly of 28 September 2004 in order to comply with the new Belgian law of 2 May 2002 on non-profit associations, international non-profit associations and foundations, which sets new rules on accounting, transparency and publicity of the acts of associations. In accordance with the new law, the Board changes the way decisions are taken. Decisions will now be taken by a simple majority of the members present or represented (rather than by a majority of the national sections represented). This new provision gives more weight to the stronger sections, which are able to afford the costs of having more members attend Board meetings. Nevertheless, in order not to disadvantage the smaller sections, the statutes provide that at the request of one tenth of the members (present or represented), the Board is obliged to check whether the majority of the members' votes also corresponds to the majority of the sections represented. If not, the decision is postponed to the next meeting and requires a two-thirds majority to be adopted.

When Wilhelm-Georg Hanss becomes president of CIRIEC in 2008, he introduces an innovation by adding a scientific presentation on a current topic as a regular item on the Board meeting agenda. In this way, he intends to promote dialogue between practitioners and academic researchers and will be a strong advocate of joint meetings and seminars between the decision-making body and the International Scientific Council.

4.3. Scientific Bodies

Once again, there is a great deal of stability in the presidency of the scientific bodies. The 'big shake-up' in 2003 (which sees the replacement of the presidents of both the International Scientific Council and the two scientific commissions) places three figures at the head of the scientific bodies for the long term: Benoît Lévesque presides over the International Scientific Council for almost seven years. He is replaced in 2010 by Luc Bernier (National School of Public Administration, Quebec) who in turn hands over to his French colleague Philippe Bance of the University of Rouen in 2014. The two men know each other well as they have frequently collaborated and have notably co-directed research on the renewal of public action.

The longevity record goes to Professor Rafael Chaves (University of Valencia, Spain), head of the Social and Cooperative Economy commission for more than twelve years. Marie J. Bouchard, professor at the University of Quebec in Montreal, succeeds him in 2015. She has been active for many years within the commission where she coordinated the working group dedicated to the evaluation of the social economy. She received the Canadian Association for Studies in Cooperation Award in 2012.

In 2014, after chairing the 'Public Services/Public Enterprises' commission for ten years, Gabriel Obermann hands over to Professor Massimo Florio, director of

the Department of Economics, Management and Statistics at the University of Milan (Italy), who has previously demonstrated his commitment to the commission by directing a major European research project in 2009 (on the interoperability between the European Structural Funds and the provision of services of general economic interest) and by initiating a research project on the future of public enterprise two years later.

4.4. Internal life

4.4.1. The international secretariat

At its meeting in Madrid in April 2004, the Board formalises the change of title of Bernard Thiry and Barbara Sak. The former becomes Director General and the latter Deputy Director General (before being appointed Managing Director in December 2006).

As we have seen, research contracts are an important source of income for CIRIEC. Their increasingly regular tendering obliges the international secretariat team to be ever more reactive and therefore to carry out an enormous amount of administrative work (particularly in terms of compiling files and monitoring projects) and scientific work. One of the challenges of the strategic operation is therefore to strengthen the secretariat in order to be able to cope.

All the more so since Marylin Garcia, one of our most experienced secretaries, with almost 30 years of service, is kept away from CIRIEC by a long illness in the mid-2000s. In March 2007, a new employee is hired on a part-time basis. A lawyer by training (trained at the Université Libre de Bruxelles), Maya Abada assists Barbara Sak, whose responsibilities increase as the career of Bernard Thiry, director of CIRIEC International, advances. Indeed, when the latter becomes CEO of the Belgian insurance company Ethias¹⁴⁵ in October 2008, Barbara Sak is appointed Secretary General of the Belgian section. In autumn 2013, Lia Caponetti (project manager until August 2021) joins the team, while in 2014, Maya Abada



Christine Dussart, Maya Abada, Carmela De Cicco, Suzy Lhonneux, Marilyn Garcia and Christelle Pasquier at the 29th Congress of CIRIEC - Vienna, 2012 (CIRIEC collection)

leaves CIRIEC to resume her studies. A new documentalist is hired in the spring of 2015: Coline Compère assists Christelle Pasquier, who now mainly focuses on the Agora project and CIRIEC's external communication.

4.4.2. Financial situation

CIRIEC's financial situation at the beginning of the period is rather positive, since it has managed to reduce its debt to the Belgian section by 83% in one year. The following years are less favourable, though. The difficulty of winning research tenders and the ever diminishing profit margin that these provide have an impact on CIRIEC's budgetary balance, especially as the crisis that erupts in 2008 is accompanied by a decline in subsidies.



Bernard Thiry and Barbara Sak in Ankara, in 2005 (CIRIEC collection)

the International Centre¹⁴⁷. The International Board decides to increase the 2009 membership fees by €500 (€250 for the weakest sections and the most remote countries). The minimum contribution for recognition as a national section remains unchanged (€2,000). In addition to the already recurrent problem of unpaid or late membership dues, there are also exchange rate issues: in 2010, the Japanese and Latin American sections experience difficulties due to the unfavourable exchange rate of their currencies against the euro. The Board therefore agrees to temporarily revert to the system in place prior to the introduction of the new system, i.e. payment of dues in euros, yen or US dollars. This change means a reduction of around €500 in the contributions of Japan and the Latin American countries. The loss of the Belgian federal government's subsidy (amounting to €35,000) in 2012 is a major blow to the International Centre, which plunges back into the red with a deficit of more than €51,000 and a debt to the Belgian section that reaches €135,000 at the end of 2013. A new increase in membership

Despite a slight increase in the amount of intermediary contributions¹⁴⁶, the years 2006 and 2008 close on a sizeable negative balance. The association's reserves (built up over a decade ago and carried forward from year to year) are called upon each time to cover the loss, and in 2008 the Austrian section agrees to pay an exceptional contribution of €5,000 to support

¹⁴⁵ Ethias is the new name of the Société mutuelle des administrations publiques (SMAP), which played an important role in supporting CIRIEC during its establishment in Belgium (see chapter I).

¹⁴⁶ The minimum and maximum contributions are left unaffected by this measure.
¹⁴⁷ CIRIEC archives, International Board of CIRIEC. Lisbon, 27 March 2009, p. 6.

contributions is then decided: in 2015 they are raised to €3,500, €7,000 and €14,000, i.e. a significant increase (derogations are nevertheless possible). Although CIRIEC is not in major distress thanks to the reserves mentioned above, the occurrence of regular, not to say recurrent deficits does constitute a serious challenge and requires reflection on structural solutions which will be put in place in the second half of the 2010s.

5. Scientific activity: pursuing the fundamentals and developing new initiatives

5.1. International Congresses

The success of this biannual event is unabated: in Lyons (27-28 September 2004), 500 participants attend the 25th International Congress, which focuses on «The response of the public, social and cooperative economy to society's expectations: fundamental rights, social needs, solvent demand». Two years later, another hundred or so people come to Istanbul (19-21 June 2006) to discuss the role of the public, social and cooperative economy in the development of a more responsible and solidarity-based economy. But a record number of participants is reached in Seville (22-24 September 2008) where 750 delegates (from 37 countries) meet around the topic «Innovation and management: responses to the major challenges facing enterprises in the public, social and cooperative economy». Organised by CIRIEC-Spain (in collaboration with CEPES-Andalusia) and under the patronage of King Juan Carlos, the event is particularly impressive because it is the first time that a Nobel Prize in Economics is in attendance: at a time when the first effects of the subprime crisis are being felt in Europe, the American Joseph Stiglitz (Columbia University) addresses the particularly topical issue of the excesses and dangers of the financial world. Moreover, the congress features thematic workshops and round tables. It is a response to the reflection carried out internally for several years with a view to rethinking the format of CIRIEC's congresses: the invitation of star speakers was one of the avenues considered, as was greater use of debate and discussion.

As the global recession takes hold, the title of the Berlin Congress (16-19 May 2010) sounds like a message of hope: «The public and social economy: a way out of the economic crisis and a support for sustainable development». It takes stock of the effects of the crisis on the public and social economy and illustrates the



Program of the 26th CIRIEC Congress - Istanbul, 2006 (CIRIEC collection)



Wilhelm-Georg Hanss, Leona Detiège and Bernard Thiry delivering the Edgard Milhaud Prize to Kristof De Witte at the Berlin Congress, in 2010 (CIRIEC collection)

innovations they have developed in employment, training, local and territorial development, but also in environmental matters. Two innovations mark this congress. Firstly, it serves as the setting for the presentation of the first Edgard Milhaud Award. Secondly, on the last day, visits to five municipal companies are organised. The encounters between scientists and practitioners that this formula encourages are perfectly in line with CIRIEC's desire to bring its two target audiences closer together.

The concept is therefore used again at the next congress, which takes place in Vienna from 12 to 14 September 2012 on the topic «The public, social and cooperative economy in the service of the general interest». The congress is very hands-on in its approach: five sectoral workshops (on transport, water and energy distribution, waste collection, health care, social housing, social services and higher education) are held in enterprises. Meetings also take place in plenary sessions and more traditional workshops featuring, as usual, a number of public figures, such as Benoît Hamon, French Minister for the Social and Solidarity Economy, or Pauline Green, President of the International Cooperative Alliance (ICA).

The 30th International Congress of CIRIEC marks a change: meeting from 29 to 31 October 2014 in Buenos Aires, it is held for the first time on the South American continent and thus confirms the region's place on the collective economy scene. Under the general theme «Public, social and cooperative economy: innovative responses to global problems», exchanges take place on the solutions provided by the social and public economy in employment, societal inclusion or sustainable development (in environmental and territorial terms).

5.2. International Social Economy Research Conferences

One of the priorities formulated by the strategic planning exercise was to revitalise CIRIEC's activity by organising more scientific meetings at international level. This new initiative is one of the ways to achieve this goal. It responds to a need expressed by many researchers for a specific meeting place to discuss their work on the social economy in general.

The opportunity arises in 2007, with the organisation of a conference by the Canadian Social Economy Hub (CCÉS - *Centre canadien d'économie sociale*). Located in Victoriaville (Quebec), the latter facilitates collaboration between

various regional social economy research centres in Canada and develops international exchange on this economic sector. As its scientific committee is mostly made up of members of the CIRIEC network, it is only logical that the Canadian section and the International Centre join the CCÉS as co-organisers and that CIRIEC acts as the scientific manager of the event. The 1st World Social Economy Research Conference is held in Victoria, British Columbia from 22-25 October 2007 on the topic «Building Communities: The Social Economy in a Changing World». It is a huge success with 355 participants from 35 countries. The event is aimed at scientists (young or experienced) from all over the world and from various disciplines (economists, of course, but also sociologists, lawyers, historians, etc.) and offers a broad overview of current research in the various fields of the social economy.



Announcement of the 1st CIRIEC International Research Conference on Social Economy - Victoria, 2007 (CIRIEC collection)

Like the congresses, the conference takes place in the form of plenary sessions and workshops. However, it differs in that its audience is mainly composed of researchers and academics (and not practitioners), in its working languages (Spanish is added to French and English) and in the practice of 'poster sessions': in order to avoid overloading the programme, some contributions are not presented orally, but are posted on the conference premises. This new formula, which allows younger researchers and doctoral students to present their current research to an international audience, proves to be successful and will be repeated at future conferences. The organisation of this biennial event (in odd years, so as not to interfere with congress) is handled by the scientific commission 'Social and Cooperative Economy' and by the national section of CIRIEC which hosts the event, which has the advantage of not putting an additional burden on the permanent secretariat.

Östersund (Sweden) hosts the second conference on 1 and 2 October 2009. The conference is dedicated to the topic «The social economy in a world in crisis» and highlights how solidarity, which is the basis of the social economy, has been able to compensate for the decrease in social protection budgets. It also concludes that there is a need to share scientific knowledge on the social economy through the establishment of international networks.



Rafael Chaves at the 3rd CIRIEC International research conference on social economy - Valladolid, 2011 (CIRIEC collection)

The third conference focuses on the role of the social economy as a pillar of a new model for sustainable economic development. It takes place from 6 to 8 April 2011 at the University of Valladolid, Spain. In keeping with the desire to share experiences, the closing session compares the situation of the social economy and its development prospects on three continents (Asia, Latin America and Europe).

The 2013 edition is held in Antwerp (24-26 October) under the title «Social Economy on the Move, at the Crossroads of Structural Change and Regulation». In addition to scientific contributions, it includes visits to social economy enterprises and initiatives in Antwerp and Turnhout.

From 15 to 18 July 2015, the 5th meeting of social economy researchers takes place in Lisbon, this time to discuss the place of the social economy in a globalised world.

After the first five editions, it appears that the challenge CIRIEC set itself has been met. On average, the conference has attracted some 350 participants from around forty countries each time; nearly 375 submissions were received, about half of which were presented orally, with some of the others being presented in poster sessions. In just a few years, the event has become an essential meeting place for researchers in the social economy and one of CIRIEC's main showcases.

5.3. Scientific Research

Obviously, scientific research is also impacted by the choices made in the course of the strategic operation, insofar as the latter provides for greater supervision by the scientific bodies in order to increase the coherence of the research programme and to ensure that it is better aligned with current research and the expectations of people in the field (CEOs, political decision-makers, etc.). In addition, the aim is to broaden the geographical coverage of CIRIEC's research by tackling less Eurocentric subjects.

The International Scientific Council plays a leading role in this respect: responsible for research strategy and ensuring regular contact between practitioners and scientists, it starts an extensive strategic monitoring exercise in 2008. The aim of this continuous assessment process is threefold: to provide information to set research priorities; to make CIRIEC one of the international driving forces in

scientific research by identifying promising topics; and to process an increasingly complex flow of information in such a way as to render it operational for the members. Three people are particularly involved in this project: Marie J. Bouchard, Luc Bernier and Benoît Lévesque. The first two publish a monthly newsletter, while the third writes a summary report twice a year, alongside a selection of around one hundred articles. This strategic watch quickly proves to be very useful: it reveals new thematic trends (management and evaluation, definition of a common base for the various sub-sectors of the social economy, new public management, public policies, governance, etc.) or, on the contrary, subjects that are less well covered (public enterprises). Unfortunately, the cost of this project makes it impossible for CIRIEC International to sustain it in the long term. As no solution can be found, this activity is phased out from 2004 onwards.

However, the impact of the strategic operation and the monitoring work is evident when we take a look at the topics addressed by the commissions and working groups from the mid-2000s onwards. For example, the studies quickly integrate the issue of the effect of the crisis on the public and social economy, while a topic such as «the future of the public enterprise» clearly expresses the wish to project into the future in



Luc Bernier, Léopold Beaulieu and Marie J. Bouchard (CIRIEC Canada collection)

order to better anticipate promising research topics. Similarly, many research projects show a desire to address actors in enterprises (organisation and governance, cooperatives and social dialogue) or policy makers (integration of the social economy into public policies, satellite accounts, etc.).

Despite these encouraging results, the functioning of CIRIEC's network remains unsatisfactory, as the International Scientific Council meeting in Valladolid¹⁴⁸ points out in 2011. It has not succeeded in becoming a 'reservoir' capable of responding to calls for tenders or conducting various research projects simultaneously. In the wake of this meeting, Luc Bernier, president of the International Scientific Council, makes an assessment of the results of the strategic planning operation¹⁴⁹. In particular, he highlights the limits of a model that operates on a voluntary basis and a research cycle that is too long (sometimes exceeding two years)¹⁵⁰. Among the avenues envisaged are the multiplication of research groups to allow for ad hoc participation of members, the establishment of semi-virtual groups

and the increased use of technology. Still, as we shall see later, one of the major challenges remains the need to strengthen the network of researchers around CIRIEC.

5.3.1. Public Economy Research

The 'Public Services/Public Enterprises' commission's new research («Experiences and challenges with regard to competition and regulation - consequences and challenges for public services»), which starts in 2004, is the subject of a special issue of the *Annals*¹⁵¹. At the same time, the commission follows the European Commission's Green Paper on services of general interest and is involved in the analysis of CIRIEC's internal and external environment carried out as part of the strategic planning exercise. Its new project, which starts in 2006 and runs for four years, consists of an inventory of the modes of provision of local public services (transport, water distribution and waste disposal). After collecting data from ten countries, mostly in Europe, but also Algeria and Japan, the commission then analyses the challenges facing local public services. Two discussion seminars are organised in Pavia (Italy), in April 2009 and September 2010, in order to present the results of the research to an audience including external experts. The results show that the European Commission's directives aimed at harmonising the various sectors fail to take into account the specifically local elements that influence general interest supply contracts. Four reports are published as *working papers* and/or in the *Annals*, which also dedicate a special issue to the topic¹⁵².

The economic crisis that sweeps the world after the burst of the real estate bubble in the United States (subprime crisis) triggers a process of nationalisation of many ailing private companies (banks, insurance companies, etc.). CIRIEC, which since its creation six decades ago has made the public economy one of its favourite research themes and has followed (and studied) the long privatisation movement that has destructured public services since the 1980s, is obviously particularly well placed to analyse this new paradigm shift and to question whether the phenomenon is permanent. In 2009, Philippe Bance and Luc Bernier initiate a new virtual working group within the 'Public Services/Public Enterprises' commission. Made up of researchers from different disciplines (economics, sociology, political science, etc.), it examines the question of the renewal of public intervention in the context of the crisis and whether or not a new mode of regulation should be put in place¹⁵³. CIRIEC thus returns to the study of public enterprises as such, a topic that international research had long since abandoned.

¹⁵¹ Gabriel Obermann (dir), *Provision of Public Services : International Experiences and Issues*, AEPSC/APCE, 2007, Vol. 78, n° 3, (special issue), 174 p.

¹⁵² Gabriel Obermann & Giuseppe Bognetti, *Research on Local Public Services*, AEPSC/APCE, 2012, Vol. 83, n°4, (special issue), 152 p.

¹⁵³ Two years later, it results in the publication: Philippe Bance & Luc Bernier, *Crise contemporaine et renouveau de l'action publique – Vers l'émergence d'un nouveau mode de régulation ? / Contemporary Crisis and Renewal of Public Action – Towards the Emergence of a New Form of Regulation?*, Brussels, Peter Lang, 2011, 333 p.

¹⁴⁸ CIRIEC archives, Minutes of the International Scientific Council of CIRIEC, Valladolid, 5 April 2011, p. 3-4.

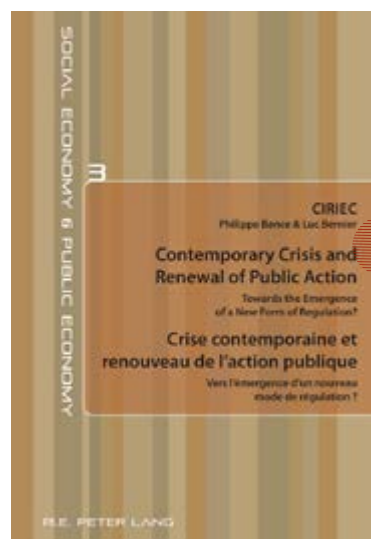
¹⁴⁹ CIRIEC archives, Luc Bernier, Note on research in CIRIEC International and on challenges posed by research, Valencia, 22 October 2011.

¹⁵⁰ Plus an additional year for collective publications.

As one of the few scientific institutions to benefit from this expertise at the international level, it launches an ambitious project 'The Future of Public Enterprise' in 2012. This project, which keeps the commission busy for two years, is intended to counteract the loss of interest in public economy research (which is reflected in the non-renewal of public economy university chairs after their holders' retirement). The study is conducted from a transdisciplinary and international perspective and involves young researchers from outside CIRIEC, with the secondary aim of meeting the challenge of renewing CIRIEC's network. Led by a committee composed of Professors Massimo Florio (University of Milan, Italy), Gabriel Obermann (University of Vienna, Austria), Luc Bernier (Ecole Nationale d'Administration Publique de Québec) and Philippe Bance (University of Rouen, France), a major research programme is defined, with the triple objective of compiling a bibliography of recent scientific literature on public companies, encouraging empirical studies (based on a common analysis grid) and finally drawing up an inventory of the characteristics of these companies (mode of governance, socio-economic benefits, etc.). Each phase is the subject of an international seminar, organised respectively in Berlin, Milan and Brussels in 2013. With this project and following the example of its 'Social and Cooperative Economy' counterpart, the commission also intends to compile an updated database of specialists that can be accessed quickly when calls for tender are issued for research contracts. The study results in two books and special issues of the review¹⁵⁴. It also leads to an international conference at the Centre Pierre Mendès France in Paris-Bercy in February 2015. It should be noted that the SuPER survey (Survey of Public Enterprises Return) started online by the University of Milan in autumn 2013 is an offshoot of this project.

In 2014-2016, the commission launches a new call for papers to study the main public enterprises in a country. By means of systematic country analyses, the aim is to highlight the resilience of public enterprises, to identify the main actors, the missions that governments assign to them, etc. Thanks to the dynamism of Massimo Florio and his multiple contacts at global level, a seminar, organised

154 CIRIEC international & Luc Bernier, *Public Enterprises Today: Missions, Performance and Governance – Learning from Fifteen Cases*, Brussels, Peter Lang, Coll. *Social Economy & Public Economy*, n°5, 2015, 526 p.; Philippe Bance (dir.), *L'internationalisation des missions d'intérêt général par les organisations publiques : réalités d'aujourd'hui et perspectives [The internationalisation of general interest missions by public organisations: realities today and perspectives]*, Rouen-Havre, PURH, 2015, 283 p.; *Critical Issues in Public Enterprise Reform*, *Journal of Economic Policy Reform*, Sep 2014, Vol. 17, n° 3 (special issue), 8 p.; Philippe Bance, Fabienne Fecher & Gabriel Obermann, *Serving the General Interest with Public Enterprises New Forms of Governance and Trends in Ownership*, AEPSC/APCE, 2015, Vol. 86, n°4 (special issue), 192 p.



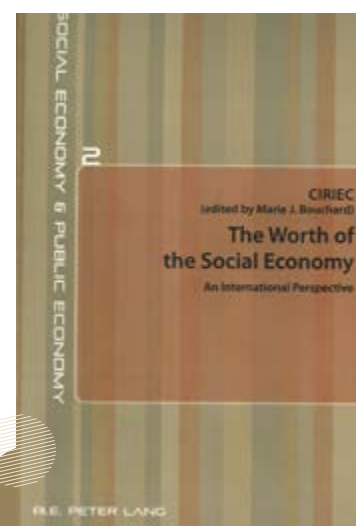
in Milan in June 2015, presents the situation in some twenty countries on all five continents, including countries where CIRIEC does not have (or no longer has) a national section (Algeria, Australia, China, Croatia, Finland, India, Lithuania, Russia, Switzerland, United Kingdom, etc.). This worldwide coverage is a first for the commission. This research results in the publication of various working papers in 2015 and a special issue of the journal *Economia Pubblica* in 2016.

CIRIEC and the University of Milan (Jean Monnet Chair) play a central role in the EUsers project through their respective networks of researchers. This network brings together universities from six European countries (Austria, Finland, France, Germany, Italy, United Kingdom). It aims to promote initiatives (innovative teaching approaches, applied research, policy debates) that address the issue of services of general interest (SGI) in the European Union from a user perspective. Its main topics are energy, telecommunications, transport and environmental services. It gathers knowledge on SGIs, disseminates it to a wide audience through books and public debates involving policy makers and academia. EUsers believes that the criterion for evaluating public or private SGI provision should be consumer welfare. CIRIEC plays an active role in the events organised by the network (Paris conference in 2015, Rouen Workshop and Conference in 2017, etc.).

5.3.2. Social and Cooperative Economy research

The strategic planning operation is also debated in the 'Social and Cooperative Economy' commission: on the basis of a report on the state of research in the social economy in Europe and in the world, the commission reflects on new avenues of investigation as early as 2004 and from 2007 onwards invests in the organisation of international conferences on social economy research, which leads to a certain slow-down of its scientific activities proper.

The absence of measurement indicators and evaluation criteria for the social economy that are recognised by academic and political circles weakens the position of this sector and limits its ability to participate in major societal debates. The commission tries to remedy this lack by setting up a new working group at the end of 2004. On the basis of case studies in various countries, its objective is to draw up a typology of the main evaluation tools, to compare them and to determine their impact on the very conception of the social economy. Initiated and coordinated by Marie J. Bouchard, professor at the University of Quebec in Montreal, this research, which lasts more than two years, is innovative in its practical organisation, since it uses an intranet site specifically created for the occasion and allowing the 75 members of the group to exchange more efficiently between meetings. The organisation of a seminar open to



speakers from outside the working group also makes it possible to test the results obtained in the face of contradiction. A collective work is published in English on the basis of the initial conclusions¹⁵⁵. The book fills a gap in the scientific literature on the social economy by providing a critical overview of evaluation methods and recommendations.

The work carried out at the request of the European Commission with the aim of defining a methodology for drawing up satellite accounts for the social economy (see below) is also part of the aspiration to provide this sector with practical tools to measure its impact and thus to strengthen its recognition.

The following research, conducted from 2008 to 2010, aims at better understanding the conception that political actors have of the role of the social economy. A collective work on the subject is published in 2013 under the direction of Rafael Chaves and Danièle Demoustier (University of Grenoble, France)¹⁵⁶. By means of an international comparative analysis, it highlights various modes of emergence and types of public policy relating to the social economy, as well as the reciprocal influences between the sector and policymakers. In the meantime, the commission initiates a new research topic, geared more towards statistics: «The weight, size and scope of the social economy as a sector - International perspectives for the production of social economy statistics». Coordinated by Marie J. Bouchard and Damien Rousselière (Agrocampus Ouest, Rennes, France), this working group brings together statisticians and more generalist researchers and intends to produce a book for specialists and policy makers who are still looking for valid tools to measure the weight of the sector in terms of employment, turnover, contribution to social cohesion, etc. Published in 2015¹⁵⁷, it is the subject of various promotional activities: presentation at a meeting of the 'Social Economy' category of the European Economic and Social Committee - EESC - (Brussels, June 2016), use in workshops at the Global Social Economy Forum (Montreal 2016), etc. As an indication of the global relevance of CIRIEC's work, it is translated into Korean in 2019.

In 2013, two parallel working groups are launched. The first is coordinated by three professors: Gani Aldashev from the University of Namur (Belgium), Marco Martini from La Sapienza University in Rome (Italy) and Michael Kopel from the University of Graz (Austria) and focuses on the question of the organisation and governance of social economy enterprises. It aims to compare current practices in the sector with those implemented in traditional enterprises (types of relationships

within the structure, remuneration of directors, democratic organisation, etc.) and to improve knowledge of managerial practices in the social economy. Two special issues of the *Annals* are the result¹⁵⁸.

About thirty researchers from fifteen countries form the second working group around two French professors (Nadine Richez-Battesti from the University of Aix Marseille and Xavier Itçaina from the University of Bordeaux), with the objective of reflecting on the topic «The social and solidarity economy (SSE) and territories. Between interaction and co-construction». In 2018, it results in a collective work in the CIRIEC collection published by Peter Lang (see next chapter).

5.3.3. Transversal Research

In 2006, a new research project involving both the public economy and the social and cooperative economy is started. It follows on from the work of the transversal working group set up in 2003, since it again focuses on social and health services of general interest. This time, the aim is to provide an overview of the situation in various sectors in eight EU member states: long-term care, care for the elderly and disabled, social (re)integration services, childcare, social housing and employment services for disadvantaged people. Another aim is to compare developments in these sectors with European legislation in order to highlight any stumbling blocks. This extensive work, carried out in collaboration with the European Centre for Social Welfare Policy Research in Vienna (Austria) and the Institute for Social Work and Social Education in Frankfurt (Germany), is a response to a call for proposals by the European Commission (DG Employment, Social Affairs and Equal Opportunities). The report in English is published in 2008 on the EU Commission's website¹⁵⁹.

In 2009, a new cross-cutting research project is launched in response to a call for proposals by the European Parliament. It concerns the interoperability between the European Structural Funds and the provision of services of general (economic) interest, from a cross-border perspective. It is coordinated by Massimo Florio and conducted in collaboration with the Centre for Industrial Studies in Milan (Italy) and the Public Policy and Management Institute in Vilnius (Lithuania). CIRIEC is in charge of the theoretical part and the case studies in a series of European countries. The research has great political significance, as it is intended to help the European Union to evaluate its cohesion policy and to make

158 Gani Aldashev, Marco Marini & Thierry Verdier (dir.), *Governance of Non-Profit and Non-Governmental Organization Within- and Between- Organization Analyses*, AEPSC/APCE, 2015, Vol. 86, n°1 (special issue), 178 p. ; Michael Kopel & Marco A. Marini (dir.), *Organization and Governance in Social Economy Enterprises*, AEPSC/APCE, 2016, Vol. 87, n°3 (special issue), 192 p.

159 Manfred Huber, Mathias Maucher & Barbara Sak, *Study on Social and Health Services of General Interest in the European Union*, [s.l.], European Center-ISS-CIREC, 2008, 372 p. (available online: https://www.ciriec.uliege.be/wp-content/uploads/2015/12/study_social_health_services_en-2008.pdf).

recommendations for its improvement (with a view to the possible promotion of cross-border services within the EU). The report (in English, French and German) is presented to the European Parliament in December 2010.

5.3.4. Commissioned Research

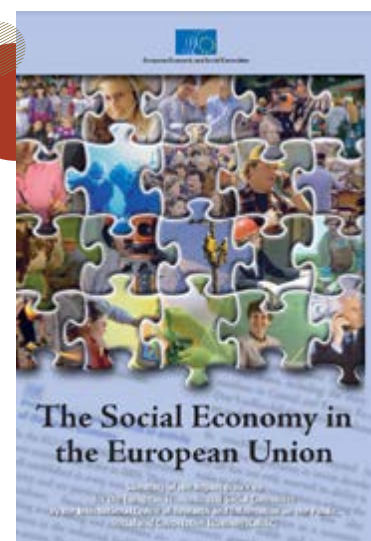
The strategic planning exercise has highlighted the fact that calls for tender will henceforth be the rule for the awarding of research contracts. These calls are not only important for CIRIEC's visibility, but also for its funding. It is therefore essential that CIRIEC adapts to this new situation and adopts measures to optimise coordination and information exchange with its network members and national sections. At first, the International Centre manages to position itself well in this competitive field, but little by little, the number of unsuccessful proposals rises, as access to calls for tenders becomes increasingly difficult: on the one hand, they are gradually being monopolised by large specialised consultancy agencies; on the other hand, they concern more and more technical and specific aspects and issues.

The period 2004-2007 is CIRIEC's golden age in terms of contracts with various European bodies. Not counting the two transversal research projects mentioned above and the work carried out for DG Regio (see Chapter III), CIRIEC is awarded no less than four major research projects.

The first is commissioned by the European Parliament and concerns a study (to be completed in 3 months!) on Services of General Interest in the Internal Market. Written by Professor David Hall, director of PSIRU (Greenwich), Gabriel Obermann and Barbara Sak, the study is designed to answer 50 questions and to provide parliamentarians with elements enabling them to better understand the economic and legal issues related to the draft directives on services of general interest (and in particular the Bolkestein directive, regulating the circulation of services within the internal market). The report proposes a definition criterion that could serve as a basis for a future legislative proposal on services of general interest.

The *European Manual for Drawing up the Satellite Accounts of Enterprises in the Social Economy: Cooperatives and Mutual Societies* is arguably one of CIRIEC's most fundamental contributions to the recognition of the social economy in Europe. Although it is a rapidly growing sector, it lacks institutional visibility and is difficult to quantify. Indeed, its different components (cooperatives, mutual societies, associations, etc.) do not feature as specific sectors, but are instead scattered within the system of national accounts, which is the main tool to report on economic activity. It is therefore very difficult to statistically assess the contribution of the social economy. Taking as a model the *Handbook on Non-Profit Institutions in the System of National Accounts* published by the United Nations, the European Commission (DG Enterprise) wishes to develop a tool to obtain consistent and reliable statistics on social economy enterprises with a

market activity. Drawing on CIRIEC-Spain's experience in this field (see above), Professors José Barea (University of Madrid) and José Luis Monzón conduct the study on behalf of CIRIEC International and provide a methodology for extracting structured 'satellite accounts' from national accounts. The manual is presented to the European Commission in February 2007 and a seminar is held in 2010-2011 to share good practice from the various national experiences. The manual drafted by CIRIEC has since been used by a number of countries.



At the request of the European Economic and Social Committee (EESC), the third research project is carried out with the aim of drawing up a picture of the social economy in the European Union, highlighting the different realities of the social economy in the various EU member states and providing a clear definition of this concept. This vast project is coordinated by Rafael Chaves and José Luis Monzón, with the collaboration of partners from the various countries of the European Union. It is an update and extension (to 25 of the 27 EU countries) of the data collected in the 2000 survey on 'third system' companies and organisations in the EU. The report (published in English, French and Spanish) also outlines the challenges and issues of the social economy and its contribution to the building of Europe and provides a set of recommendations to support the sector.

Twice, in 2011-2012 and 2017, CIRIEC updates this overview of the social economy, this time extended to the 27 countries of the European Union and the accession countries.

CIRIEC is also involved in the study «Social Dialogue, Industrial Relations» conducted by Cooperatives Europe in the framework of the European Commission's *Social Partner Programme*. Through a series of surveys carried out in the 27 member states of the European Union, CIRIEC is tasked with assessing the situation of the cooperative movement (at national and European level), its place in social and professional negotiations, etc. The aim is to assess what the cooperative model can contribute to the existing social dialogue and to develop alliances between social partners.

5.4. Editorial Policy

The strategic planning exercise has revealed the need to redefine CIRIEC's publication policy in order to improve its visibility at international level. Various measures are taken in this respect.

5.4.1. The Annals of Public and Cooperative Economics

The strategic choices made in previous years (see Chapter III) have had a beneficial effect on the review. Each year, it offers three issues with a variety of articles plus a thematic issue. Its content remains faithful to the editorial line defined since its creation, namely to promote the collective economy among the public through scientific articles, without this preventing it from occasionally tackling new topics and opening up to current issues (quasi-markets, voluntary work, microfinance, fair trade, etc.). Moreover, thanks to the efforts of the Wiley-Blackwell publishing house (since 1995), its readership has continued to grow: the number of subscriptions jumped twice at the beginning of the period, from 1182 in 2003 to 1525 in 2004, then 2144 in 2005. The recommendations resulting from the planning exercise therefore focus less on the content than on how to increase the review's scientific visibility and obtain the academic recognition it deserves. To this end, two avenues are pursued: the commemoration of the review's centenary and its indexation.

2008 is indeed a special year for the *Annals*, which commemorate the hundredth anniversary of their creation by Edgard Milhaud. While it is appropriate to celebrate this unusual longevity (threatened on several occasions), it is also a unique opportunity to promote the review at international level. A special '100 years' issue is published for the occasion: it covers the history and evolution of the *Annals* over the course of the past century, but also the changes that have characterised its preferred field of study: the economy of general interest. In addition to a series of authors close to CIRIEC, it also features articles by a number of renowned experts from various disciplines: such as the jurist Susan Rose-Ackerman (Yale University), the economists Jean-Michel Glachant (University of Paris I) and Avner Ben-Ner (University of Minnesota), and the historians Ian MacPherson (British Columbia University) and Éric Geerkens (University of Liège). The *Annals* also take advantage of the occasion to adopt a new look. A celebratory event is held on 24 September 2008, in conjunction with the Seville Congress.

Achieving indexation of the *Annals* in the Social Sciences Citation Index (SSCI) is the second objective. Being listed in this interdisciplinary rating system, which includes 3,000 scientific journals covering most disciplines in the humanities and social sciences, is indeed a key to academic recognition. Two attempts to gain acceptance by the SSCI fail. On both occasions, the problem is the citation of articles from the *Annals* in other scientific journals. The problem is partly



Anniversary Issue for the 100 Years of the Annals

owed to the fact that the CIRIEC review is both a generalist publication (likely to be of interest to practitioners as well) and that it addresses the entire scope of the collective economy (covering a potentially very broad field of activities). However, very specialised journals are more likely to enter the SSCI index. The second obstacle is the subject matter itself: the *Annals* defend an economic model considered to be rather heterodox (based on solidarity and the general interest rather than the classic private economy) which contrasts sharply with the mainstream conception of the economy (centred on the market economy) shared by most economics journals (and therefore those indexed in the SSCI). Other listings are easier: the review is included in the JEL/EConLit and SCOPUS databases set up respectively by the American Economic Association and Elsevier.

The issue of open access is also on the agenda and the continuation of the review in paper format is debated. Hence, the International Scientific Council evaluates the review at its meeting in February 2015. The positive evolution of the review is confirmed: it enjoys international circulation; the number of subscriptions is on the rise, as well as the number of article downloads (30,000 more in five years); it is well ranked by national evaluation agencies; its article acceptance rate remains stable at around 35-40% and the content of the issues is fixed more than a year in advance. Moreover, excluding special issues, the journal attracts an overwhelming majority of authors from outside the CIRIEC network (9 out of 10). Apart from the uneven quality of the articles, the main weaknesses pointed out relate to the lack of internal homogeneity (multidisciplinarity, mix of classical and heterodox approaches, dual field of interest, bilingualism, dual readership, etc.), all of which are consistent with the review's initial objectives.

5.4.2. New collections, new modes of dissemination

One of the weaknesses of CIRIEC's editorial policy is its inability to rapidly communicate the results of its research. In 2007, an electronic collection of *working papers* is launched. It replaces the former paper-based collection published since 1982¹⁶⁰. Reporting to the International Scientific Council, the scientific editors of the collection are Fabienne Fecher (editor-in-chief of the *Annals*) and the presidents of the two scientific commissions. The research papers are published in one of CIRIEC's three working languages (and subsequently also in Spanish and Dutch) and are distributed mainly electronically via the CIRIEC International website. This formula has the advantage of great flexibility compared to journals and books, as it does not require the finalisation of a coherent (and large) set of texts before publication. It therefore allows a much faster dissemination of the early results of the work within the scientific network, with an average of about ten *working papers* published each year. In October 2015, a new editorial

¹⁶⁰ From 1996 to 1999, CIRIEC's *Working Papers* were merged with the *Cahiers de recherche* of the faculty of Economics, Management and Social Sciences (ULg), before being published again independently by CIRIEC (in paper format) from 2000 onwards.

committee is set up: it includes Philippe Bance, Marie J. Bouchard, Massimo Florio and Marco Marini, the new editor-in-chief of the *Annals*.

While CIRIEC makes greater use of the Web to disseminate its scientific work, it has not abandoned traditional publishing, far from it: in 2008, a *Social Economy & Public Economy* series is created within Peter Lang, a Swiss publishing house specialising in the humanities and social sciences. Directed by Benoît Lévesque and Bernard Thiry and supported by a review committee of eight people active in CIRIEC's international scientific bodies, it proposes publications that provide «an international perspective on analyses of organisations and activities oriented towards the general interest and the collective interest»¹⁶¹. Its approach is multidisciplinary and encompasses economics, social sciences, law, political science, etc. Inaugurated in 2008 with the publication on governance and the general interest in social and health services, the result of a cross-disciplinary working group led by Bernard Enjolras of the Institute for Social Research, Oslo (Norway)¹⁶², this collection rapidly becomes one of the main channels through which the results of the research carried out within CIRIEC are disseminated. Although officially open to authors from outside the CIRIEC network, it has up to now produced a total of seven issues, all of which are linked to the work of CIRIEC's scientific bodies¹⁶³. Unfortunately, the collection has had mixed results in terms of dissemination, linked among other things to the difficulty of selling collective publications on economics, their high selling price and insufficient promotion by the publisher (vis-à-vis bookshops and academic circles). On the other hand, the option of switching to open-access virtual publication has long come up against several strong arguments: financial viability, as well as the insufficient value in terms of academic recognition and therefore the reluctance of young researchers (in their quest for credits for their CVs) to publish in this form.



Marie J. Bouchard and Massimo Florio at the 31st CIRIEC Congress - Reims, 2016 (CIRIEC collection)

5.5. Life and activities of the national sections

Most national sections continue the research, publication and/or event organisation activities of previous periods (which we will not go into further). However, some develop new initiatives or undergo major changes. For others, life will be anything but a smooth ride. This will be the case for Venezuela, Brazil, Sweden, Turkey and especially Italy.

5.5.1. CIRIEC-Germany: from Gesellschaft für öffentliche Wirtschaft (GÖW) to Bundesverband öffentliche Dienstleistungen (BVÖD)

In the mid-2000s, a project is underway to consolidate the German sections of CIRIEC and CEEP and to create more synergies between them. This gradually brings about the merger of the two sections into a new structure: the *Bundesverband öffentliche Dienstleistungen* (BVÖD) established in 2007. Its president is Hans-Joachim Reck, secretary general of the powerful Association of Municipal Enterprises in Germany (*Verband kommunaler Unternehmen* - Vku). Katerina Reiche, former Federal Minister (CDU) for Transport and Digital Infrastructure, succeeds him in 2015 as head of the Association and of BVÖD. The new structure is formally recognised as the German section of CIRIEC on 1 January 2008. Its activities continue to focus on the organisation of conferences and seminars (e.g. on the separation of infrastructure and network operators) and the holding of the International CIRIEC Congress in Berlin (2010). From 2008 onwards, it sets up a series of working groups ('Renaissance of the public sector', 'Municipal services' and 'Social welfare in the digital age') and, between 2012 and 2015, is heavily involved in the preparation of a handbook on the public economy¹⁶⁴ which will be published at the end of 2019, shortly before BVÖD's leaves CIRIEC International, as we shall see in the next chapter.

5.5.2. CIRIEC-Argentina



Folder of the 30th CIRIEC Congress - Buenos Aires, 2014 (CIRIEC collection)

The death of Arturo Octavio Ravina in 2006 marks a halt for the section. Hector Polino, a former member of the federal parliament and ardent opponent of privatisation in the country, takes over the reins. Shortly afterwards, the section hosts the 13th ICA-America regional conference in Buenos Aires and signs a cooperation agreement with the University of Flores to develop a training and promotion programme in the social economy. In 2007, José Pablo Puzino becomes the new president of IAIES (*Instituto Argentino de Investigaciones de Economía Social*) which constitutes the section. In October of the following year, it organises (in collaboration with CIRIEC International) an international seminar on the topic of the

161 CIRIEC archives, Activity Reports. *International Centre and National Sections*, Liège, CIRIEC, September 2008, p. 15.

162 Bernard Enjolras (dir.), *Gouvernance et intérêt général dans les services sociaux et de santé* [Governance and general interest in social and health services], Brussels, Peter Lang, Coll. *Social Economy & Public Economy*, n°1, 2008, 265 p.

163 For a list of the books in the series, please refer to the Peter Lang website: <https://www.peterlang.com/view/serial/ESEP?rskey=F5Acqn&result=1> [most recent consultation: 17 June 2021]

164 Markus Kraiewski, Holger Mühlenkamp et alii (dir.), *Öffentliche Wirtschaft: Handbuch für Wissenschaft und Praxis* [Public Economy: Handbook for Science and Practice], Baden Baden, Nomos, 2019, 746 p.

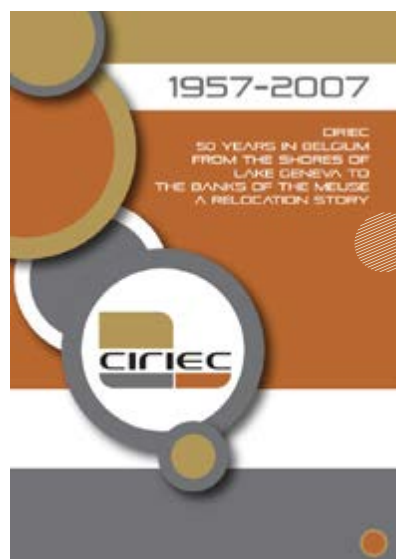
social economy in the face of the economic and financial crisis. On this occasion, the Board meets for the first time in Buenos Aires. Since then, the section has been active in researching the opportunities and strengths of cooperative trade in Argentina, in a publication on home-based work, in organising pre-congresses in 2011 in Rosario (Santa Fe) and Santiago del Estero, and above all in hosting the 30th International Congress of CIRIEC in Buenos Aires in 2014.

5.5.3. CIRIEC-Austria

In the early 2000s, the Austrian public sector goes through a period of crisis with the State selling part of its stakes. The Austrian section (*Verband der öffentlichen Wirtschaft und Gemeinwirtschaft Österreichs* - VöGW) therefore becomes more involved in matters relating to the municipal economy and updates a book on the situation of this sector in the EU-25. It is presented under the patronage of the Austrian President at the 7th Conference on Municipal Economy in Vienna (9-10 November 2004). It then embarks on the preparation of a handbook for the Austrian energy economy. In 2007, Christian Oxonitsch, a Social Democrat MP (SPÖ), becomes the section's new chair. It conducts various research projects (privatisation issues, added value of local public services, impact of the 4th railway package, etc.) and develops expertise on trade liberalisation agreements (CETA, TTIP). In 2012, it is in charge of organising the 29th CIRIEC Congress (in Vienna). Finally, it seeks to develop a specific bachelor's degree programme on the public and collective economy in higher education institutions. Its permanent concern is to respond as quickly as possible to the expectations and wishes of its many members in the Austrian federal, regional and local public sector.

5.5.4. CIRIEC-Belgium

Once again, research work is the main focus of the Belgian section during this period («Employment in the social market economy» for the Walloon Region, study of the employment impact of the establishment of DHL in Wallonia, «Problems of competition and regulation: consequences and challenges for public services», management of large-scale distribution networks in Europe, study of the Walloon provinces' financial situation and tax fields, etc.). In 2010-2013, it is involved in two important research projects for the European Commission: the establishment of satellite accounts for the social economy and the study of the interoperability between the European structural funds and the provision of services of general economic interest in a cross-border perspective.



In 2008, Bernard Thiry permanently resigns from his position as director of the Belgian section to focus on the management of the insurance company Ethias. Barbara Sak is appointed secretary general of the section.

In addition, as part of the CIRIEC International Secretariat, the Belgian section is involved in most CIRIEC events and hosts various events itself. In 2007, it celebrates the 60th anniversary of CIRIEC. The commemoration is the occasion for a historical publication on the relocation of the International Centre's headquarters from Geneva to Liège¹⁶⁵ and the launch of a brand new bilingual (French-English) website. In 2013, Antwerp hosts the 4th International Conference on Social Economy Research. Finally, it should be remembered that the Kiosk of the general interest and the social economy (Agora) was developed and directed by the Belgian section since its launch in 2014.

5.5.5. CIRIEC-Brazil

In the mid-2000s, the Brazilian section is affected by the financial difficulties of its main partner, the *Centro Educacional de Tecnologia em Administração* (CETead). However, this does not prevent it from setting up regional bases to cover the whole of this huge (continent-sized) country, and decentralised structures are set up in Rio de Janeiro, Santa Catarina, Curitiba and Sao Paulo. At the same time, it develops various scientific partnerships for publications and training. It is involved in the evaluation of public policy in favour of bioenergy and sustainable territorial development and in 2007, with the support of CIRIEC-Canada, it organises a symposium in Florianopolis on sustainable territorial development. At the end of 2008, it collaborates in the launch of an electronic journal *Saberes interdisciplinares*. Despite these activities, and due to a lack of support from companies and institutions, the section is unable to meet its commitments to the International Centre (especially in terms of membership contributions). In 2013, CIRIEC-Brazil is dissolved.

5.5.6. CIRIEC-Canada

The life of CIRIEC-Canada is punctuated by the annual conferences it continues to organise. During this period, it also drafts an inventory of research in Canada on the public and social economy and, in 2006, sets up a 'transfer working group' that aims to improve the transfer of knowledge to partners through the section's activities. An implementation committee ensures that the decisions of the working group are implemented. This reveals a willingness to focus more on the issue of social responsibility of collective enterprises. The section also intends to focus its activities on the transversality between the public and social economies. In the following years, the environmental dimension, sustainable development and responsible finance are on the agenda of several events. At the same time, the section participates in the establishment of a Canadian network of partnership

¹⁶⁵ Ludo Bettens, 1957-2007, CIRIEC. 50 years in Belgium. From the shores of Lake Geneva to the banks of the Meuse - a relocation story, Liège, CIRIEC, 2007, 74 p.

research in the social economy, made up of regional nodes. In 2007, it organises the 1st World Conference on Social Economy Research in Victoria. During this period, the review *Économie et solidarités* starts moulting into a fully electronic edition. CIRIEC-Canada also financially supports the monthly electronic watch bulletin ECO-SOC Info. Finally, during this period, the section celebrates its 40th anniversary: Benoît Lévesque writes a book on the history of the section for the occasion¹⁶⁶.

5.5.7. CIRIEC-Spain

The *Revista de debate sobre economía pública, social y cooperativa* remains one of the main showcases of the Spanish section. Over the years, it has become one of the most prestigious scientific journals on economics in Spain and is listed in numerous indexes (including SCOPUS and World of Science - WOS). CIRIEC-Spain is also very active in the organisation of international events: examples include the Scientific Congress of the International Cooperative Alliance (May 2004 in Segorbe), the 10th Day of Researchers in Social and Cooperative Economy (June 2005 in Baeza, Andalusia), the 4th Iberian Colloquium of Cooperativism and Social Economy (Córdoba, 2007), the 27th International Congress of CIRIEC (Seville, 2008) and the 3rd International CIRIEC Research Conference in Social Economy (Valladolid, 2011). It is involved in the foundation of a Spanish Observatory of the Social Economy (with an electronic newsletter, the *Boletín*) and an Ibero-American Observatory for Employment and the Social Economy (OIBESCOOP, located in Santiago de Chile), which brings together 22 countries and seeks to generate initiatives in the field of the social economy (research, new enterprises) via a portal, an electronic newsletter and seminars (the first of which is held in Valencia in September 2008). Its research includes a broad study on the third non-profit sector in the Mediterranean, the elaboration of a manual for the establishment of satellite accounts of social economy enterprises, and work on social integration enterprises in Spain and on the place of the social economy in public policies. 2011 marks the 25th anniversary of the section, which organises a commemoration in Valencia and publishes a book on its history¹⁶⁷, as well as a comic book on the section's leaders¹⁶⁸. After José Luis Monzón resigns



Comic published for the 25th anniversary of the Spanish section of CIRIEC (CIRIEC collection)

in April 2015, José María Pérez de Uralde, director of the Basque Social Economy Observatory, takes over the presidency of the section.

5.5.8. CIRIEC-France



Pierre Vionnet (honorary director general of the *Organisme commun des institutions de rente et de prévoyance*) holds the presidency of the section from 2004 to 2008, when he is succeeded by Alain Arnaud, president of the *Mutualité de la Fonction publique*. Key moments for the section include the organisation of the CIRIEC international congress in Lyons (2004), the organisation of a colloquium in 2011 with the 2009 Nobel Prize in Economics (Elinor Ostrom) as keynote speaker, and the CIRIEC international conference in Paris on the future of the public enterprise (2015). In this period, CIRIEC-France also develops new initiatives such as an electronic newsletter, *Brèves du CIRIEC France*, and the creation of new research groups: the first one on the social economy (2008) is led by Professors Danièle Demoustier (Institute of Political Studies of Grenoble) and Nadine Richez Battesti (University of Aix-Marseille) and focuses on the social and solidarity economy (how it is impacted by the transformations of public policies, its organisational innovations, etc.). The second group (2009) studies the public economy and is coordinated by Philippe Bance and Jacques Fournier. It is particularly interested in public action in the context of the crisis and in the internationalisation of general interest missions by public organisations.

5.5.9. CIRIEC-Italy

The slow disintegration of the Italian section is undoubtedly one of the darkest episodes in the history of CIRIEC International. From the beginning of the 2010s, CIRIEC-Italy has been in a critical financial situation: the government has cut structural funds to scientific and cultural institutions. CIRIEC is in litigation with the State because of a subsidy which, although established by law, has not been paid for 15 years and amounts to a total loss of income of almost 1.5 million euros. Despite this, commissioned research and publication activities continue, including the collection of books on the history of large Italian public companies. An important project is also underway to digitise its archives, databases and library (which is recognised as a national intellectual and historical heritage) and make them accessible online. In 2014, the section even manages to relaunch the publication of the journal *Economia Pubblica* (discontinued since 2010). Unfortunately, after the refusal of the Renzi government (centre-left as it may be) to pay its debt to CIRIEC-Italy, all the staff of the secretariat is dismissed in 2015;

¹⁶⁶ Benoît Lévesque, *Le Ciriec-Canada (1966-2006). Quarante ans de partenariat en recherche sur les entreprises publiques et d'économie sociale* [Ciriec-Canada (1966-2006). Forty years of partnership in research on public enterprises and the social economy], Anjou (Québec), Éditions Saint-Martin, 2009, 251 p.

¹⁶⁷ CIRIEC-España 1986-2011, *Noticias de la Economía Pública Social y Cooperativa*, 2011, n° 55 (special issue), 72 p.

¹⁶⁸ José María Pérez de Uralde (dir.), *El dossier de los tambores monzónicos*, Valencia, Fundación Divina Pastora, 2011, 35 p.

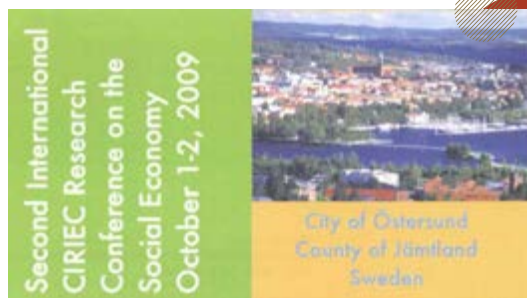
only a few volunteers continue the work, among them the secretary general and former communist activist Massimo Pinchera.

5.5.10. CIRIEC-Japan

The activity of the Japanese section continues unabated in the mid-2000s: in addition to its traditional activities (organisation of an annual conference, publication of works, etc.), it develops new initiatives: it awards two new prizes (in addition to the two previous ones) aimed at encouraging young researchers to complete a master's degree or a doctoral thesis. It is especially noteworthy for its desire to extend to the Asian continent (South-East Asia, Taiwan, Hong Kong, but also China and South Korea) by co-organising symposiums on various topics in these regions and countries. CIRIEC-Japan thus plays a decisive role in the dissemination of the public economy and also especially the social economy. In December 2010, a meeting of the Praesidium is held in conjunction with the commemoration of the 25th anniversary of the section. On this occasion, a conference is organised on the topic «Structuring the Global Sustainability» (including environmental and social welfare issues in a global perspective). The Fukushima disaster, hitting Japan hard in 2011, causes a major downturn in the section's activities, as Tokyo Electric Power Company (TEPCO), the Japanese state-owned nuclear energy operator, is its largest member. However, it gradually manages to get back on track. In 2013, it decides to redeploy its activities in three directions: the possibility of individual membership in the section, the development of activities that may be of interest to public institutions and companies, and finally the resumption of the extension of its network to East Asia. As of December 2015, the section is chaired for six years by Munenori Nomura (professor at Kwansei-Gakuin University).

5.5.11. CIRIEC-Sweden

In 2006, anticipating the problems associated with the government's announced closure of the National Institute of Working Life (NIWL), which houses its premises and employs various members of its staff, the section announces its intention to open up to the whole of Scandinavia and therefore to change its name to CIRIEC-Scandinavia. In the immediate future, the aim is not so much to change its membership, but rather to try and make it easier to obtain research contracts and to promote interregional collaboration with Finland and Norway. The CIRIEC Board would like the section to show the first results of its re-consolidation before sanctioning this change in structure, especially as the CIRIEC statutes do not provide for the creation



Folder of the 2nd CIRIEC International Research Conference on Social Economy - Östersund, 2009 (CIRIEC collection)

of transnational sections¹⁶⁹. The growing recognition of the social economy at the policy level has led to an increase in research on this sector. The section is somewhat revived through its participation in a project funded by the European Regional Development Fund and the creation of a new cooperative intersectional committee¹⁷⁰. However, a true revival is slow in coming and the section disappears at the end of 2011, two years after the organisation of the 2nd CIRIEC World Research Conference on the Social Economy (in Östersund, in October 2009).

5.5.12. CIRIEC-Turkey

The Turkish section, which has been backed by the cooperative sector since its creation, also goes through a period of turbulence at the end of the 2000s, when cooperative enterprises become increasingly reluctant to finance it. The departure of Teskomb, one of its four members, forces it to find a new partner to ensure its financial stability. The University of Ankara agrees to take on this role and thus temporarily saves CIRIEC-Turkey. However, from 2013 onwards, CIRIEC-Turkey ceases to be a national section as such. The Association of Turkish Cooperatives, the founder of the first cooperatives in Turkey, remains a member of CIRIEC as a collective member.

5.5.13. CIRIEC-Venezuela

In 2004, Benito Diaz, professor of sociology at the University of the Andes, becomes the new president of the Venezuelan section. This is a particularly difficult time for the section as it is hit by the severe economic and political crisis in the country. Despite attempts to bring the section's members together and to find funding, CIRIEC-Venezuela is soon unable to pay its membership contribution and enters a state of lethargy. As a result, the section is temporarily suspended in 2006, but is reinstated less than two years later after demonstrating efforts to regularise its situation. The new president is Mario Fagiolo, professor of economics at the University of Orient, while Benito Diaz is in charge of international relations. The section, which moves to Trujillo within the Research Centre for Sustainable Integral Development (CIDIS) of the University of the Andes, continues its traditional activities (organisation of a national symposium on the social economy, publication of the journal *Cayapa*, etc.). It also develops a training course on cooperativism and the social economy. At the end of the period, the country is again beset by major economic and political difficulties. The section is weakened and has difficulty maintaining contacts with the outside world.

5.6. Ever more international collaboration

¹⁶⁹ Minutes of the meeting of the International Board of CIRIEC. Seville, 18 May 2007, p.3.

¹⁷⁰ This new structure (which replaces KOOPi) represents the Swedish cooperative movement in the European Intersectional Cooperative Committee and the International Cooperative Alliance.

Collaboration with other organisations related to the public, social and cooperative economy at international level has been one of CIRIEC's missions since its creation. This collaboration takes various forms: simple presence or speaking at international events (European seminars of the European Liaison Committee on Services of General Interest - CELSIG and of the European Economic and Social Committee, CEEP congresses, European conferences of local enterprises, European Conference of the Social Economy in Central and Eastern European Countries, etc.), or even the organisation and moderation of a working session (International Conference of the Social Economy and Social Enterprise in Prague in April 2009).

Meanwhile, several important partnerships are formed during the period.

5.6.1. *ILO Interregional Social and Solidarity Economy Academy*

Since its creation in 1947, CIRIEC has maintained regular (albeit informal)



contacts with the International Labour Organisation (ILO). Edgard Milhaud himself had initially dreamt of making CIRIEC a branch of the venerable institution. In 2010, an institutional partnership is formed with the ILO's International Training Centre (ITC) with the launch of an 'interregional academy'. The project is to stimulate knowledge of the social and solidarity economy and the exchange of experiences between people from all over the world. It brings together a young audience with - for a change - a majority of women, and is aimed at people with a variety of profiles: political decision-makers, representatives of trade unions and employers' organisations, SSE practitioners and promoters, but above all public officials in order to introduce them to this new way of doing things. CIRIEC International participates in these Academies through an institutional partnership with the ILO International Training Centre. Alongside other experts from several national sections (notably Canada and Spain), Professor Leandro Pereira Morais of CIRIEC-Brazil leads and co-writes the trilingual manual (French, Spanish, English) which is produced for each edition. After a first edition in Turin (25-29 October 2010), the Academy is hosted by Montreal (24-28 October 2011) and Agadir (Morocco, 7-12 April 2013). This last edition is the occasion of a collaboration with the Moroccan Network of Social and Solidarity Economy. This is a great opportunity for CIRIEC, which wishes to open up to North Africa.

5.6.2. *Research in partnership with the European Centre of Enterprises with Public Participation and Enterprises of General Economic Interest / European Centre of Employers and Enterprises Providing Public Services and Services of General Interest (CEEP)*

The relationship with CEEP intensifies in the 2000s and the two institutions work in partnership on several research projects. In 2008, CIRIEC participates as a member of the Monitoring Committee in a major research project launched by CEEP (funded by the European Union). Entitled 'Mapping Public Services', it seeks to draw up a statistical overview of public enterprises providing services of general interest in the 27 countries of the European Union (size, sector, legal forms, cross-sectoral or transnational elements, etc.) and to analyse the industrial relations they develop and the social dialogue they establish. The results of this important study are presented to the European Parliament in 2010.

5.6.3. *The Mont-Blanc Meetings and Social Economy Europe*



Organised for the first time in 2005 on the initiative of several French and Quebec social economy enterprises (some of which are members of CIRIEC's sections), the Meetings are an international forum for leaders of the social and solidarity economy. Held each year in November, the event brings together several hundred participants with the aim of highlighting this type of economy. It is therefore logical that links are forged with CIRIEC, which shares the same interest in the collective economy. In mid-June 2013, a memorandum of understanding is signed between the two organisations. It aims to strengthen both partners through the exchange and dissemination of information and reciprocal participation in events and scientific bodies. Two years later, in November, the agreement is extended to a third partner, the European Social Economy Network (Social Economy Europe), and provides for mutual support, the organisation of international events and the joint submission of applications in response to calls for tender. In 2016, CIRIEC's 'Social and Cooperative Economy' commission joins the Mont Blanc Meetings in the person of Marie J. Bouchard.

CHAPTER V: CIRIEC'S INTERNATIONAL EXPANSION (2016-JANUARY 2022)

1. General economic context: when a human and health crisis supersedes the economy

In 2016-2017, nearly ten years after its outbreak, the financial crisis seems to be receding for good: many countries have returned to their pre-2008 levels, and despite some fragility, the global economy is showing greater stability. While everyone is clinging to these encouraging signs of recovery, the sky is still cloudy: the main driver of growth (China) is showing signs of slowing down (its growth has halved), while the crisis has wreaked havoc on employment and has contributed to further widening social inequalities. In addition, a succession of political crises (particularly in the Near and Middle East) are shaking the planet, while the dramatic effects of global warming are becoming more apparent every day. Affluent countries (Europe, United States) are facing a massive influx of migrants fleeing war or misery and decide to cautiously fold in on themselves.

In addition to the many global challenges, there is an unprecedented health and human crisis. The coronavirus first appears in November 2019 in Wuhan and rapidly spreads around the world, wreaking havoc¹⁷¹. Faced with this global pandemic, most states impose a variety of measures, including drastic travel restrictions (both internationally and within each country), bringing entire sectors of economic activity to a standstill over a long period (particularly transport, hospitality, tourism and culture, which are the most severely affected¹⁷²) and causing a sudden slowdown in growth. Throughout the crisis, the important role played by the State and public enterprises, on the one hand, and by social and solidarity economy initiatives, on the other, in terms of combating the pandemic and maintaining essential services (health and social services, transport, etc.), was confirmed. This role is highlighted by a series of contributions from CIRIEC's national sections and is the subject of a general resolution adopted by the International Centre at the end of its General Assembly on 27 October 2020, which calls on « everyone to get involved in this era of economic, social and ecological transition and to take collective action to co-construct sustainable development

¹⁷¹ In mid-June 2021, the WHO Coronavirus (COVID-19) Dashboard reports around 176.5 million confirmed cases of infection and nearly 4 million deaths (see current data: <https://covid19.who.int/>).

¹⁷² Only a few months after the outbreak of the pandemic, the UNTFSSSE statement «What role for the social and solidarity economy in the post-Covid-19 crisis recovery?» (June 2020) already makes the following damning observation: «More than 2.2 billion workers live in countries where workplaces have been closed. According to ILO estimates, 436 million enterprises (including 389 million self-employed) operate in high-risk sectors (manufacturing, food and accommodation services, real estate, wholesale and retail trade). The ILO estimates a loss of 305 million jobs worldwide». (see: https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---emp_ent/---coop/documents/publication/wcms_753449.pdf).

policies that combine social and economic progress, environmental and health protection, and preservation of resources»¹⁷³.



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The economic situation gradually improves in 2021, due in particular to strong output growth in the US and China. In May 2021, various analysts predict that by the end of 2022 the economies of many countries will be back to their pre-crisis levels...

In addition, there are many concerns about how countries will manage the post-Covid era: the pandemic has (further) increased social inequalities and resulted in massive public spending and deficits in all states. At EU level, the 'general escape clause' of the Stability and Growth Pact, activated in March 2020, temporarily relieves member states from meeting normal budgetary requirements, but it is to be deactivated by 2023 at the latest. It is likely that many states will then revert to drastic austerity policies which, as always, are likely to affect public spending (and in particular spending on health care, an essential sector as the pandemic has shown). Against this gloomy backdrop, Joe Biden's stated intention, shortly after taking office in January 2021, to introduce a global minimum corporate tax rate is an encouraging prospect. Similarly, many hopes rest on the 2030 Agenda for Sustainable Development drawn up by the United Nations and adopted in

¹⁷³ General Resolution. COVID-19: Response from Actors of the Public, Social and Cooperative Economy, Paris, 27 October 2020. This resolution, as well as the various contributions accompanying it, can be consulted online: <http://www.ciriec.uliege.be/wp-content/uploads/2020/12/GENERAL-RESOLUTION-doc-final-FULL.pdf> [most recent consultation: 14 June 2021].

2015 by all its member states. The 17 goals of the Agenda are aimed at protecting the planet and ensuring prosperity, peace and justice for all its inhabitants¹⁷⁴.

Because of the travel restrictions (both national and international) that it has brought about, the coronavirus pandemic is the stage for a complete upheaval in working methods, particularly an unprecedented development of the phenomenon of teleworking and the generalisation (and above all the performance improvement) of virtual videoconferencing platforms. In the coming years, we are clearly going to witness, across the globe, a profound change in the way most companies and professional associations operate. For CIRIEC, whose strength lies in its international network, this could prove to be a great opportunity. For example, videoconferencing (which was used very sparingly in the past) offers enormous possibilities for keeping in touch with national sections and members of the scientific network: transcontinental relations no longer have to be synonymous with long and expensive air travel, booking constraints and jetlag! This has had an impact on participation in the International Board and General Assembly meetings held (online) over the past two years (marked by a significantly higher representation of non-European sections such as CIRIEC-Japan or Latin American sections). While these digital tools are not suitable for the organisation of CIRIEC's bi-annual events (international congresses and social economy research conferences) and can never replace the human contacts that are at the heart of CIRIEC's dynamics, they could, however, prove to be an additional way of solving one of CIRIEC's main problems since its creation, namely the involvement in its activities of the smaller, more financially fragile sections or of independent researchers.

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2. Geographic expansion of the CIRIEC network

2.1. New National Sections

Over the past five years, CIRIEC has experienced an internationalisation of its membership, as we will see later, but it has also been marked by the disappearance of two of its historical sections: Italy and Germany.

As mentioned in the previous chapter, the Italian section finds itself in a critical situation in 2015, having to let go of the entire secretariat staff. Only the determination of Massimo Pinchera and a few volunteers keeps the section alive temporarily, but the death of the Secretary General in 2016 sounds the death knell for CIRIEC-Italy. Since 2017, various researchers (including Alberto Zevi, Marco Marini and Giuseppe Bognetti) have been working tirelessly to resurrect a section in collaboration with the universities of Milan (Massimo Florio) and Bologna (Giulio Ecchia and Flavio Delbono). Draft statutes were drawn up and a mechanism was implemented to ensure the publication of *Economia Pubblica* (thanks to the contribution of local public sector foundations). However, these

¹⁷⁴ For a description of the 17 Sustainable Development Goals, see: <https://www.un.org/sustainabledevelopment/fr/objectifs-de-developpement-durable/>

efforts to create a new section have been slowed down considerably by the long process of winding up the old structure and have not yet been successful.

In the mid-2010s, the *Bundesverband öffentliche Dienstleistungen* (BVÖD) goes through a major restructuring at both the administrative and scientific levels, which even leaves CIRIEC-Germany without staff for a while. In addition, more and more of the section's member companies expect a consultancy service that does not correspond to the scientific dimension of CIRIEC. This situation accentuates these companies' growing lack of interest in CIRIEC's scientific activities, and even turns into opposition when the research of German professors is too critical or calls into question the governance of municipal companies. For several years, Rainer Plassmann remains the only representative of the section to be involved in the International Centre, but after his departure (as president of CEEP, and then on retirement), the German section disaffiliates from CIRIEC in 2020. In order not to remain without a member for too long in this country, which is a driving force of the economy in the European Union, contacts are immediately established. They quickly result in an application for membership from an inter-university centre based in Leipzig, the *Kompetenzzentrum Öffentliche Wirtschaft Infrastruktur und Daseinsvorsorge* (KOWID). With objectives very similar to those of CIRIEC, it aims in particular to disseminate research results, especially to practitioners. KOWID's application is approved in 2021, constituting the first step towards the possible reconstitution of a German section.



Logo of CIRIEC's German member

These defections are certainly a blow to CIRIEC in several respects. First of all, symbolically: these two historical sections (both disappearing on the eve of their 60th anniversary) had played an important role in the consolidation of the organisation at the scientific level. Moreover, both had a strong base in public enterprises (one of CIRIEC's two main fields of study). Now, only five sections still have public enterprises among their members (Austria, Belgium, Canada and, to a lesser extent, France and Japan). Moreover, the disaffiliation of the two sections has important financial implications. The Italian section had a large debt to CIRIEC International which cannot be settled, resulting in a loss to the international organisation of some €40,000. The German section was one of the strong sections and its disappearance deprives the International Centre of an annual contribution of €14,000. Fortunately, the dissolution of the two sections has no real impact on CIRIEC's scientific activities: German and especially Italian researchers continue to be involved in the research carried out.

The consequences will be more marked in terms of CIRIEC's geographical representation: while two sections in some of the largest and most populous countries of the European Union disappear, new sections are created on other continents. CIRIEC, for a long time very Eurocentric, has now become very international.

CIRIEC's most spectacular growth takes place on the American continent, and more particularly in Latin America, and is undoubtedly the result of the joint efforts made for many years by the Spanish, Canadian and Portuguese sections.

In November 2017, the International Board ratifies the recognition of a 'new' section in Brazil¹⁷⁵. It succeeds the section created in 2002 but unfortunately dissolved a few years later. The initiative is taken by several professors from the Pontificia Universidade Católica de Campinas who were already involved in the creation of the previous section (around CETEAD in Salvador de Bahia). As soon as the latter is dissolved in 2013, they set about re-establishing a new section. At the beginning of 2016, the statutes of a new structure (which meanwhile includes other universities) are filed, with the social and solidarity economy as its priority field of study (particularly in the face of legislative regulation and in terms of its contribution to local social and economic development). Although it admits that it has few international contacts, being mainly focused on local and territorial studies, and that its entrepreneurial base is weak (it has only two companies among its members), the Board decides to trust the young structure, as it evinces strong determination. After its bid to host the 33rd International Congress



Advertisement of the world conference organized by CIRIEC Brazil in 2021 (CIRIEC collection)

of CIRIEC in Salvador de Bahia is rejected (on account of the election of a far-right president, Jair Bolsonaro), the section pursues its desire to organise a world conference on 17-18 and 19 September 2020, but the coronavirus pandemic makes it impossible to hold the event and it needs to be postponed. It will finally take place (online) in April 2021.

At the same International Board meeting, CIRIEC-Turkey is officially recognised. This is also a 'rebirth', since, like its Brazilian counterpart, the previous section disappeared in 2013. CIRIEC-Turkey is reconstituted on the initiative of a core group of professors from Istanbul's Gelişim¹⁷⁶ University (including rector and vice-rector Burhan Aykaç and Nail Öztaş). Close to the world of business and the cooperative sector - the Turkish Cooperative Association, the former collective member of CIRIEC is associated with it - its main field of action is the promotion of the social economy, which has taken on great importance in Turkey, and it aims to bring together the academic world, policy makers and practitioners. Because of its academic background, the section is active in organising workshops to raise awareness of the growing importance of the social economy (the «Social Economy Convention - Student Workshop Studies»). It also conducts

¹⁷⁵ CIRIEC archives, Minutes of the meeting of the International Board of CIRIEC, Namur, 17 November 2017, p. 2.

¹⁷⁶ The Turkish word *gelişim* means «development»

research projects on the cooperative sector, with a particular focus on women's employment in this sector¹⁷⁷.

2019 is an important year for the geographical expansion of the International Centre, as it sees the fulfilment of a long-held dream: the establishment of CIRIEC on the African continent. The dream comes true in the form of a Tunisian section, created under the impetus of the international relations and research departments of *Union générale tunisienne du travail* (UGTT - Tunisian General Labour Union), the country's main trade union (and one of the four organisations awarded the Nobel Peace Prize in 2015 for its contribution to the process that led to the holding of presidential and legislative elections and the ratification of a new constitution). Chaired by Naïma Hammami, deputy secretary general of UGTT (in charge of international relations and migration), supported by her colleague Souad Khallouli, CIRIEC-Tunisia brings together representatives from both the academic and corporate worlds and develops as its preferred fields of action: the public economy, the social and solidarity economy, public policies, the environment and territorial development. Initial contacts were established in 2013 in the context of an SSE Academy organised by the ILO in Agadir (Morocco) and were intensified in 2017 during the preparation of the international congress in Liège. Tunisia is a particularly favourable environment. In the wake of the 'Jasmine Revolution', the country has made the strategic choice to focus on the social and solidarity economy, which it recognises as the third pillar of development (after the public and private sectors). At the end of October 2019 and as a prelude to a seminar on the problems of privatisation and the realities of the social economy in Tunisia organised by UGTT in Tunis, CIRIEC's International Board ratifies the membership of the new section. This section is one of the driving forces behind the draft framework law on the social and solidarity economy adopted by the Tunisian government in June 2020, which is expected to have a real impact in terms of job creation and ultimately lead to sustainable and inclusive economic growth.

This meeting also marks the official recognition of a new section in North America: CIRIEC-Mexico. The latter was formed a few months earlier, on the occasion of a founding congress held in Acapulco on 31 May 2019. The new section is the culmination of a long process of support provided for several years by the Brazilian, Colombian, Spanish and Canadian sections of CIRIEC. It also benefits from a favourable context marked by the loss of momentum of neoliberalism in Mexico and the resounding victory of the left in the 2018 federal elections, which see the election of Andrés Manuel López Obrador (a left-wing candidate) as president. The *Centro Internacional de Investigación y Documentación de la Economía Pública, Social y Cooperativa* (México), which is supported by the country's two largest cooperative confederations, state agencies and six universities, brings together a variety of researchers around Roberto Cañedo Villareal, the section's

president. Through the links it creates between researchers and practitioners, CIRIEC-Mexico aims to promote the public, social and cooperative economy in Mexico and intends to be a point of reference and technical assistance for all structures active in the social and solidarity economy in this country. Thus, since its creation, CIRIEC-Mexico has initiated a large-scale project aimed at setting up and supporting cooperatives.

The Costa Rican section is officially created in October 2020. Not surprisingly in this country, which is the historical centre for the development of cooperative initiatives in Central America and the Caribbean¹⁷⁸, the new section is set up around various structures active in this sector at the initiative of the Universidad Estatal a Distancia (UNED) of San José. The section publishes a scientific review, *Revista Nacional de Administración* (RNA), and one of its first objectives is to carry out a census of the country's cooperatives in order to provide policy-makers with information on which to base their actions. Despite the difficult context of the sanitary crisis, the young section shows dynamism and organises the 8th CIRIEC Social Economy Research Conference from 8 to 10 September 2021 as part of the celebration of the bicentenary of the country's independence.



Logos of all CIRIEC sections at the end of 2021

2.2. Institutional Members

In February 2017, the Board takes an important strategic decision: from now on, a proactive policy will be pursued with regard to the affiliation of institutional members, also called 'collective members' (such as research organisations,

¹⁷⁸ In 2012 (latest available statistics), there were 594 cooperatives in Costa Rica, providing a total of some 17,600 jobs and with a combined membership of over 887,000. See *Síntesis IV censo nacional cooperativo 2012. Estado del cooperativismo en Costa Rica. Con la información avanzamos*, San José, INFOCOOP, 2012, p. 11 (available online: [censo-cooperativo-2012.pdf](https://infocoop.go.cr/censo-cooperativo-2012.pdf) (infocoop.go.cr)).

¹⁷⁷ The project «Production for Women Cooperatives Promotion for Production Project» and the making of the documentary *Borrowed from the Future: Cooperative System for Sustainable Societies* on women's cooperatives in Turkey's Aegean region.

professional associations, etc.). These members may join on payment of a contribution between €1,000 and €3,000, and the International Board may co-opt some delegates from these collective members¹⁷⁹. Although provided for in CIRIEC's statutes, this possibility has hardly ever been put into practice, except in April 2008, when Pavlos Kalosinatos of INEK-PEO (Cyprus Labour Institute) was co-opted. While the creation of a national section remains the priority, prospective efforts are now being made with institutional members. The aim is to be able to respond to the real interest shown by certain countries and to overcome the structural difficulties that often prevent the creation of new sections. The strategy pays off, since CIRIEC has nine institutional members in 2021, the majority of which are active in the field of the social economy: INEK-PEO from Cyprus is joined by Laboratorul de Solidaritate from Bucharest (Romania, 2018), Centro Internacional de Economía Social et Cooperativa (CIESCOOP) based at the University of Santiago (Chile, 2019), Sungkonghoe University in Seoul (South Korea, 2019), Salesiana Polytechnic University in Quito (Ecuador, 2020), the Social Economy Institute in Thessaloniki (Greece, 2018), the Centre for Co-operative Studies - University College Cork (Ireland, 2018), Serus - Social Economy Development Focused Organisation in Linköping (Sweden, 2018) and the Kompetenzzentrum Öffentliche Wirtschaft Infrastruktur und Daseinsvorsorge e. V. - KOWID in Leipzig (Germany, 2021).

Institutional membership is a kind of stepping stone towards the constitution of a real national section: since 2019, the Bucharest Solidarity Laboratory has been studying the possibility of transforming itself into a national section. Similarly, Serus (Stockholm), in collaboration with the cooperative sector, is considering to reconstitute a CIRIEC-Sweden in the form of a Swedish Institute for Social Economy. Finally, upon affiliation, Seoul University has committed itself to trying to set up a national section and has established contacts to this end, notably with the Korean Railways. It will also be the organiser of the 9th International Social Economy Research Conference to be held in Seoul in July 2023. At the time of writing (January 2022), none of these projects have materialised yet.

By the end of 2021, the International Centre has fifteen national sections, nine institutional members and one observer member (CEDEC) spread over four of the six continents: Africa (Tunisia), America (Argentina, Brazil, Canada, Colombia, Costa Rica, Mexico, Venezuela, Chile and Ecuador), Asia (Japan, Turkey and South Korea) and Europe (Austria, Belgium, Spain, France, Portugal, Cyprus, Greece, Ireland, Romania, Sweden). Only Oceania and Antarctica (!) have up to now remained impervious to CIRIEC's efforts. The Eurocentrism of the early days is gone: the American continent now has the largest number of CIRIEC national sections, and although Asia has 'only' three members, these are three economically active countries. Although there are currently no prospects for

¹⁷⁹ CIRIEC archives, Minutes of the meeting of the International Board of CIRIEC. Linz, 17 February 2017, p. 10. Since 2018, these institutional members also have voting rights and can appoint substitute members (CIRIEC archives, Minutes of the General Assembly of CIRIEC. Liège, 1 June 2018, p. 2).

China and India (the world's second and sixth largest economies, respectively), CIRIEC's footprint on the Asian continent has never been greater.



Logos of all CIRIEC observer and collective members at the end of 2021

2.3. Scientific Network

The reflection initiated several years ago on the added value of CIRIEC has shown that its main strength is its international network. Its valorisation at the scientific level and its contacts at the social, economic and political levels represent a real asset for the association.

The Agora of General Interest and the Social Economy is an important tool for the cohesion of the international network. Initiated in 2014, this interactive support continues to develop. However, at the end of 2016, only 110 researchers were registered despite a very rich documentary offer (with more than 15,000 documents listed¹⁸⁰ and automatic scanning of ten websites and twenty RSS feeds¹⁸¹ relevant to the collective economy). In addition, Agora sends out two newsletters per month to its members, containing news about CIRIEC, new members and the latest documents posted. In an attempt to stimulate its use, a more ergonomic and user-friendly version is launched in February 2016. While the platform is attracting more researchers (by the end of 2021, there were some 180 researchers from 39 countries¹⁸²), success remains mixed. This may be due to the fact that researchers from older generations are not familiar with these digital tools, but it can also be explained by the plethora of information readily available on the Web and therefore by the reluctance (or even laziness?) of researchers (even those belonging to the younger generation) to have to go through a specific platform (requiring an identification process) to carry out their research on the Web.

¹⁸⁰ At the end of 2021, Agora listed some 21,600 documents.

¹⁸¹ RSS feeds allow users to be notified whenever information of interest to them is published.

¹⁸² Algeria, Argentina, Armenia, Austria, Belgium, Brazil, Canada, Chile, Colombia, Croatia, Czech Republic, Denmark, Finland, France, Germany, Greece, Haiti, Hungary, Ireland, Italy, Japan, Luxembourg, Mexico, Netherlands, Norway, Peru, Philippines, Portugal, Romania, Senegal, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom, USA, Uruguay, Venezuela.

In order to strengthen the scientific network, a new communication strategy is developed: at the end of 2015, the website of the association is completely revamped, aiming not only at modernising the tool, but also (and above all) at giving more visibility to the two main components of the network, i.e. the scientists and the practitioners. The national sections and their activities are given more prominence, while the scientific work and activities of the International Centre are presented in a more dynamic way. This major project is accompanied by the modification of CIRIEC's graphic charter (new logo and replacement of communication media) and a new communication policy which is marked by the distribution of an external newsletter which widely disseminates (to nearly 10,000 contacts) news from the CIRIEC network (events, publications, calls for contributions, etc.), thus complementing the internal newsletter mentioned above. In addition, and after some reluctance, CIRIEC now also appears on social networks with the opening of Twitter and LinkedIn accounts¹⁸³ in 2017. This proved to be a wise move, as in March 2022, these two social networks had 800 subscribers and 580 contacts respectively. Its presence on the professional Web 2.0 is proving to be a 'multiplier' and is growing exponentially. Finally, in December 2020, the first issue of *Social Economy News* is released. Published in three languages (French, English, Spanish) by CIRIEC-Spain, in partnership with CIRIEC International, this online newsletter promotes the social economy and provides a wide range of information on current events in this sector, mainly within the European Union, but also beyond. Its scope is intended to be as complete as possible, both in terms of the sources of information (representative organisations, companies and entities, research centres, public institutions) and in terms of the type of information provided: information from the main social economy research centres and the results of their research, the actions of the European institutions or the work of the various governments in relation to the social economy¹⁸⁴.

In 2017, an individual membership system is introduced for the international scientific network (at least in those countries that do not have a national section). These affiliations¹⁸⁵ must be supported by two sponsors from CIRIEC's scientific network and approved by a nomination committee set up within the International Scientific Council. Already envisaged in the strategic planning exercise carried out in the mid-2000s, this formula for membership in the scientific network has various

¹⁸³ <https://twitter.com/ciriec>; <https://fr.linkedin.com/company/ciriec-international>.

¹⁸⁴ The seven issues currently published are available on the CIRIEC website: <http://www.ciriec.uliege.be/publications/social-economy-news/>.

¹⁸⁵ The membership contribution is deliberately kept low, at €180 for three years for a member from an OECD country and €90 for a member from another country. In addition, it offers a series of advantages such as privileged access to scientific commissions and a reduced subscription to the *Annals* and to various events. However, these scientific members are considered to be associate members and therefore have no involvement in the management of CIRIEC.



CIRIEC International logo since 2016

objectives. In addition to encouraging the emergence of new national sections, it also aims to strengthen the scientific network by improving researchers' sense of belonging to CIRIEC and to find a response to 'free riders' who take advantage of CIRIEC's accumulated experience and expertise without contributing, either intellectually or financially, to the maintenance and enrichment of its scientific network. The formula has met with some success: 44 members from 22 countries were registered at the end of December 2021.

3. Changes in operating mode

3.1. The International Board and the Praesidium

The increase and geographical diversification of CIRIEC's sections obviously has consequences for CIRIEC's decision-making structures, as the sections are represented by a maximum of five full members and five alternate members on the International Board. In 2018, the International Board also offers representation to institutional members¹⁸⁶. Taken together as a section, they are therefore granted a total of ten (full and alternate) members.

In 2016 and for the first time in its history, the Praesidium opens up to two representatives of Latin American sections: Hernando Zabala Salazar and José Pablo Puzino, presidents of the Colombian and Argentine sections respectively. The latter, created in 1966, had to wait more than 50 years to be admitted to

the supreme governing body of the International Centre! Two years later, Burhan Aykaç, president of CIRIEC-Turkey, joins the Board again following the re-establishment of a Turkish section.

From 2014 to 2018, Alain Arnaud, president of CIRIEC-France, is president of CIRIEC. In 2018, Jorge de Sá, president of CIRIEC-Portugal, succeeds him,



Bernard Thiry, Alain Arnaud and Leona Detiège at the 8th CIRIEC International Research Conference on Social Economy - Bucharest, 2019 (CIRIEC collection)

¹⁸⁶ In 2018, the full members are Pavlos Kalosinatos, director general of INEK-EO (Cyprus), Ioannis Nasioulas, director of the Social Economy Institute of Thessaloniki (Greece) and Ancuța Vameșu, president of Laboratorul de Solidaritate of Bucharest (Romania). In 2020, Sang-Youn Lee, director of the Institute of Co-operative Management at Sungkonghoe University (South Korea) is co-opted in turn.

but after his death in April 2019, Alain Arnaud resumes office. Four vice-presidents assist the president. During the period, they are: Erich Haider, vice-president of CIRIEC-Austria and José Luis Monzón Campós, executive director of CIRIEC-Spain (with the exception of 2016-2017, when the position is held by José María Pérez de Uralde). The other two vice-presidencies are held in turn by Jorge de Sà (2016-2018), Hajime Imamura, vice-president of CIRIEC-Japan (2016-2018), Leona Detiège, president of CIRIEC-Belgium (2018-2020), Rainer Plassmann, president of CEEP (2018-2020), Munenori Nomura, president of CIRIEC-Japan (since 2020) and José Pablo Puzino (since 2020).

In May 2019, the International Centre loses its loyal treasurer: Jean-Pierre Grafé, who had been in this position for more than ten years, dies. He is succeeded by Josly Piette, former Belgian Federal Minister for Employment and former secretary general of the Confederation of Christian Trade Unions (CSC).

3.2. The International Scientific Council (ISC)

The failure of the COTHER experiment (see Chapter III) obliges CIRIEC to (re) consider how best to keep up the dialogue between scientists and practitioners (a function performed in particular by the International Scientific Council, which is a sort of 'network of networks') and meet the needs of the latter.

Indeed, it is important to better harmonise high-level theoretical (fundamental) scientific research, the finalisation (and therefore dissemination) of which extends over long periods of time, with the immediate needs of company executives, who are more interested in applied research that provides them with prompt answers to their questions. Various avenues have been explored in recent years to square the circle, including better dissemination of research to the non-scientific public, in particular by means of the regular publication in several languages of short articles ('policy briefs') or animated videos providing a popularised summary of their development; by translating the introduction to research papers into various languages; or by means of press releases for journalists.

This recurring tension between CIRIEC's two poles (science and practice) also exists within the organisation itself, as the sections that make up CIRIEC either prioritise service to members (such as the Austrian or the Argentinian section), or are more research-oriented (such as the Canadian or Spanish section).

One of the consequences of this situation is the ISC's difficulty to function optimally, mainly due to a lack of multidirectional communication and the national sections' lack of involvement: they fail to adequately convey their scientific expectations to the ISC and few of them are represented at the meetings, thus preventing important decisions from being made. Furthermore, some researchers in the network are not very much involved in the work of the ISC, either because they are more focused on their own research or because they have difficulties in financing their travel to CIRIEC meetings.

In order to ensure its revitalisation, the International Scientific Council (ISC), which was previously composed solely of members from the national sections, opens up to a limited number of experts from outside the sections in 2017. This adaptation is intended to formalise a situation that already existed in practice, with several members of the now defunct Italian section continuing to sit on the ISC, including Massimo Florio (Università degli Studi di Milano), who chairs the scientific commission on the public sector.

3.3. Finances and Internal Life

As we have seen in the previous chapters, the financial situation of CIRIEC International is a recurrent source of concern. Budget estimates show an annual structural deficit of more than €25,000 despite careful financial management and despite the fact that the Belgian section regularly waives its claim on the International Centre for a share of its overhead costs.

Moreover, the second half of the 2010s gets off to a bad start in this respect due to the dissolution of the Italian section and the consequent obligation for the International Centre to forego the recovery of the substantial debt that it had accumulated over the last few years of its existence. Furthermore, the Japanese and Venezuelan sections of CIRIEC have accumulated a significant backlog in membership contributions (€20,000), which will result in the suspension of CIRIEC-Venezuela at the end of 2016, with four years of contributions due. There is now a high risk that CIRIEC International's equity may turn negative. Once again, the goodwill of some of the strongest sections (Argentina, Austria¹⁸⁷, Belgium, Canada, France and Germany), who agree to pay an exceptional contribution (a total of €15,000), helps to keep the situation under control in 2016. As such an effort cannot be made repeatedly, solutions are sought to redress the annual structural deficit. These will include, on the one hand, the search for new income (by trying to affiliate new national sections or, failing that, institutional members; by promoting research financed by companies and organisations) and by reducing expenditure (including, in particular, the replacement of the Peter Lang collection by internal online publications).

The most significant measure is the self-financing of the *Annals of Public and Cooperative Economics*. All costs and income generated by the review are transferred to a foundation, created specifically for this purpose (with the International Centre and the Belgian section as founding members). Named after the review's founder, Edgard Milhaud, the foundation aims at gradually rendering the *Annals* self-financing¹⁸⁸. The costs of the review (on average between €30,000 and €35,000, previously borne by the national sections) are to be covered by

¹⁸⁷ However, the Austrian section makes the payment of 50% of the contribution conditional on the accession of new members.

¹⁸⁸ To give the Foundation time to find its funding, CIRIEC International allocates a degressive annual grant, from €30,000 in 2018 to €10,000 from 2020 onwards.

fundraising from other foundations or institutions (attracted by the high scientific content of the review and the tax advantages that this represents)¹⁸⁹. CIRIEC retains a veto over any decision on the review's strategy. The board of directors is composed of members of the Praesidium of the International Centre¹⁹⁰.

The positive effects of these measures are soon to be felt, since in 2017, for the first time in four years, the financial year closes with a small profit and since then the over €50,000 of loss carried forward have been gradually recovered, despite the disaffiliation of the German section.

3.4. A team undergoing profound change

For many years, CIRIEC has relied on a stable team: Bernard Thiry (director general), Barbara Sak (managing director and also secretary general of the Belgian section of CIRIEC), Marylin Garcia (secretary of CIRIEC International), Carmela De Cicco (secretary of CIRIEC-Belgium), Christine Dussart (project manager and editorial assistant of the *Annals*), Suzy Lhonneux (secretary/accountant of CIRIEC Belgium, in charge of CIRIEC International's accounts), Christelle



Part of the CIRIEC team at the 31st CIRIEC Congress. From left to right: Suzy Lhonneux, Lindsay Escole, Christine Dussart, Lia Caponetti, Barbara Sak and Coline Compère - Reims, 2016 (CIRIEC collection)

Pasquier (librarian/documentalist) have been active in CIRIEC for two, even three decades (and even nearly four in the case of Suzy and Marylin). Consequently, the question arises of how to anticipate future retirements and compensate for the enormous loss of knowledge and experience that comes along with them. Therefore, in the period 2016-2021, the team will undergo significant changes.

In November 2015, shortly after Coline Compère, Lindsay Escole joins the team to take care of the secretariat, while in March 2019, Jérôme Schoenmaeckers is hired as project manager.

In 2018, the team loses one of its pillars when Marylin Garcia dies after a long illness. She joined CIRIEC in 1978 and was in charge of the international secretariat for 40 years, responsible for congresses and international contacts. Her knowledge of Spanish, her cheerfulness and her interpersonal skills, as well as her unfailing involvement in CIRIEC's activities had played an important role at several key moments of the International Centre (creation of the Spanish section in 1986, first European conferences on the social economy in the early 1990s). Because of her professionalism, organisational skills and knowledge of languages (including Spanish), Lindsay Escole takes charge of the CIRIEC International Secretariat.

Three years later, Suzy Lhonneux, the doyenne of the team, retires after nearly half a century of 'good and loyal service'. A living memory of the institution, she had a perfect command of all the administrative and financial aspects and was a privileged contact for many members of CIRIEC's Belgian section. Above all, she was a trusted and dependable employee on whom the management team could always rely. Marcel van Dijken, an accountant hired in February 2021, is given the difficult task of succeeding her. In August of the same year, Fanny Voisin joins CIRIEC as scientific and administrative assistant.

In addition, a reflection is underway to prepare for the retirement (announced for 2022-2023) of another key figure in the team: Christine Dussart. Former CIRIEC



From top to bottom, from left to right: Koen Albregts, Bernard Thiry, Pierre Wolper and Alain Arnaud at the signing of the agreement between ULiège and CIRIEC - Liège, 2022 (CIRIEC collection)

documentalist, she has been the editorial assistant of the *Annals of Public and Cooperative Economics* and the secretary of the scientific commission 'Social and Cooperative Economy' for over thirty years. Thanks to the high quality of her work, combined with her warm and engaging personality, she has built up an invaluable network of contacts in the international scientific world. Her replacement is therefore a major challenge for CIRIEC.

In January 2022, CIRIEC faces another challenge: the relocation of its headquarters. After twenty-six years on the Sart Tilman campus, it moves to the centre of Liège, rue Saint-Gilles n°199, in the ULiège premises at HEC-Sainte-Julienne. Although the space it has been allocated has been reduced by 40% (from ten offices to five), CIRIEC has recovered a strategic position within the Management

¹⁸⁹ CIRIEC archives, Minutes of the CIRIEC Praesidium meeting. Paris, 19 May 2017, p.4-6.

¹⁹⁰ In 2021, these are Bernard Thiry (general director), Alain Arnaud (president), Léopold Beaulieu, José Alberto Pereira Pitasas, Leona Detiège, Josly Piette and José Luis Monzón.

and Economics Faculty. Furthermore, on this occasion, a ten-year partnership agreement is signed with University of Liège.

4. Scientific Activity

4.1. International Congresses

For the fourth time in the history of CIRIEC¹⁹¹, the French section is in charge of organising the congress in 2016. This time, Reims, the city of Champagne, is chosen to host the event from 21 to 23 September. Thanks to a promising theme, «Public policies facing the social and democratic challenges of globalisation: What projects for the public, social and



From left to right: Jacques Fournier, José Maria Perez de Uralde, Catherine Gras, Monique Strycharz, Alain Arnaud, Philippe Bance, Leona Detiège, Bernard Thiry, N. and Jorge de Sá at the gala dinner of the 31st Congress of CIRIEC - Reims, 2016 (CIRIEC collection)

cooperative economy?" and an appealing programme, the congress attracts 315 participants from 26 countries, proving once again CIRIEC's wide geographical sphere of influence. Indeed, some participants come from regions where CIRIEC does not have national sections (e.g. Africa and Russia). Several plenary sessions are devoted to cross-cutting themes (economic and social realities in the world, public policies in the face of the social and democratic challenges of globalisation, ways of building more humane, social and supportive societies) and one poses the challenging question of whether the general interest is an outdated value. More specific topics (the State as a Strategist and public policies; the dynamics of the social and solidarity economy; social innovation and the reduction of inequalities; the challenges of the digital transition) are addressed in workshops or presentations. The third Edgard Milhaud Prize is awarded during the congress to highlight the work of a young doctoral student¹⁹². The success of the congress is owed to the high calibre of the exchanges, but also to an exceptional recreational event organised on the fringes of the working sessions, namely a gala dinner held in the cellars of the Pommery estate.

¹⁹¹ After the congresses organised in Puteaux (1957), Bordeaux (1988) and Lyons (2004).

¹⁹² The laureate is Léonard Moulin (université Paris 13 Sorbonne Paris Cité, France) for his dissertation *Tuition Fees in Higher Education: Issues, Limitations and Perspectives*.



Logo of the Congress of Liège, in 2018

The theme of the 32nd Congress, held from 30 May to 1 June 2018 in Liège, is «The public, social and cooperative economy in the digital revolution», a subject that is highly topical and highly relevant to corporate executives (an important part of the CIRIEC congress audience). This congress is innovative in several ways. On the one hand, given the topics addressed, it uses a *Livewall*¹⁹³. On the other hand and for the first time, the same topics are addressed both during the plenary sessions (devoted to cross-cutting aspects, such as the financing of political and economic democracies or the digital revolution at the service of local authorities) and during the workshops and round tables (which deal with more sectoral applications: the impact of the digital revolution on the water, energy or health sectors). The heatwave that accompanied the event did not discourage the 361 participants (from 24 countries), and the participation of India and various African countries bodes well for the expansion of the International Centre¹⁹⁴.

Although the biennial congresses are still one of its emblematic activities and have enjoyed undeniable success from one edition to the next, CIRIEC regularly questions whether they meet the needs of its members. It cannot help but realise that, over the years, it has become impossible to reach the attendance levels of the 1960s editions. The 900 or so participants at the Vienna Congress (1961) are now a thing of the past. The decrease in participation is particularly marked, on the one hand, among managers of the public, social and solidarity economy: companies active in these sectors tend to reduce their number of registrations, for both financial (cost saving) and ethical reasons (the participation of a large number of employees in an event outside the company - and, on top of that, abroad - is less and less well perceived by public opinion). In recent years, there has also been a decline in participation among conveners of the scientific network, forcing CIRIEC to question the attractiveness of the congresses for the latter. The matter is all the more crucial as congresses have always been the privileged meeting place for practitioners and theoreticians of the public, social and solidarity economy.

Furthermore, CIRIEC has been more attentive in recent years to the diversification of speakers at conferences and the need to include more women and young people (one of the target audiences it is struggling to reach).

The holding of the 33rd International Congress was not exactly plain sailing: the Brazilian section had applied to organise it in Foz do Iguaçu (Brazil) in

¹⁹³ A digital device designed to encourage interaction between speakers and participants at an event: comments and questions texted or tweeted by participants are displayed on a large screen.

¹⁹⁴ In fact, a CIRIEC-Tunisia section is created a few months later. As for India, it appeared in 2018 to be on the verge of hosting a new section around the National Federation of Public Enterprises SCOOP, based in Mumbai, but without any result so far.

collaboration with the Argentinian section. As the latter withdrew from the project, it was proposed that the event be moved to Salvador de Bahia. However, following the election of far-right MP Jair Bolsonaro as president, an alternative was sought. Thessaloniki (Greece) is finally chosen to host the international congress from 4 to 6 June 2020 on the subject «Public enterprises and the social economy: what dynamics in the economic, social and environmental transition?» with a particular focus on the notions of innovation, territories and partnerships. The coronavirus crisis that hits the world at the beginning of 2020 decides otherwise: made impossible by sanitary measures that prohibit physical gatherings, the event is finally cancelled, because the Praesidium considers that an online congress cannot replace the convivial meetings (and essential for networking) offered by traditional congresses. On the other hand, it is decided that a conference (easier to organise in terms of logistics) will be organised in Thessaloniki as soon as the sanitary situation allows. Already registered delegates are thus offered an alternative, which allows to limit the reimbursement of registration fees. The conference, scheduled for September 2021, will be postponed again (to 2023) following a new Covid wave.

Announcement of the 33rd CIRIEC Congress



After many twists and turns, the 33rd edition of the CIRIEC international congress should in principle be held in Valencia (Spain) (from 13 to 15 June 2022).

4.2. International Social Economy Research Conferences

Organised every two years since 2007 (alternating with congress), international research conferences on social economy are a meeting place for scientists.

Initially planned to be held in Skopje, Macedonia, and co-organised with the Association of Turkish Cooperatives, the 6th conference is finally held in Manaus in the Brazilian state of Amazonas in autumn 2017. Indeed, the organisers had expressed their intention to relocate the conference to Turkey, but the Praesidium preferred to abandon the idea, due to the political context there. It feared that President Erdogan's repressive policy in the aftermath of the attempted coup in July 2016 might have a very negative impact on the event. In the end, CIRIEC-Brazil took up the torch, in collaboration with the Universidade Federal do Amazonas (UFAM). Organised scientifically by Daniel Menezes (professor at the Universidade Presbiteriana Mackenzie and board member of CIRIEC-Brazil), the conference takes place from 29 November to 2 December 2017 on the topic «Social



Logo of the 6th CIRIEC International Research Conference on Social Economy

and Solidarity Economy. Sustainability and innovation: facing old and new social challenges». It brings together 313 participants from 21 countries, including a very large number of young (particularly Latin American) researchers and is an opportunity both in terms of consolidating CIRIEC's Brazilian section and in terms of creating new sections on the South American continent, as we have seen previously.



Musicians performing at the opening cocktail of the 7th CIRIEC International Research Conference on Social Economy - Bucharest, 2019 (CIRIEC collection)

and Solidarity Economy - towards a new economic system». It has the particularity to welcome various speakers from European (SEE, EESC, etc.) and international (ICA, ILO, UNRISD, etc.) partner organisations. This first research conference organised by CIRIEC in Eastern Europe is attended by 246 participants from 42 countries and results in numerous publications including four thematic issues of international journals¹⁹⁵.

Organised by the director of CIRIEC-Costa Rica, Professor Federico Li Bonilla, assisted by Monserrat Espinach Rueda, the 8th research conference is held in early September 2021 in San José, Costa Rica. Its theme is «Social and Solidarity Economy and the 2030 Agenda: inclusive and sustainable development through innovative social practices». The very particular context (the Covid-19 crisis) imposes specific technical constraints, as the event takes place both face-to-face and online. On the upside, it also has a very positive impact on attendance, with a total of 498 participants (148 on site and 350 online) and above all on its

¹⁹⁵ Cristina Barna & Manuela Epure, *Social and Solidarity Economy and Local Sustainable Development, Review of Applied Socio-Economic Research*, 2019, vol. 18, n°2 (special issue), 159 p.; Claudia Petrescu & Mihaela Lambru, *Social and Solidarity Economy – challenges and perspectives for sustainable development, Quality of Life Journal*, 2020, Vol. 18, n°1 (special issue), 92 p. (available online: <https://doi.org/10.46841/RCV.2020.01>); Cristina Barna, *Current Socio-Economic Challenges. Approaching Sustainability and Social Economy, Management Dynamics in the Knowledge Economy*, 2020, Vol. 8, n°1 (special issue), 107 p.; Philippe Bance & Jérôme Schoenmaeckers, *The New Age of Commons: Innovation or Necessity?*, AEPSC/APCE, 2021, Vol. 92, n°1 (special issue), 167 p.

geographical diversity. 30 countries are represented, including many Latin American countries, which strengthens the scientific base of CIRIEC-Costa Rica on the American continent. Many countries where CIRIEC does not yet have a foothold are also represented, such as Cameroon, Morocco, Honduras, Nicaragua, Peru, India, Estonia and Croatia.



In 2023, the International Social Economy Research Conference is scheduled to be held in early July in Seoul at the initiative of Sungkonghoe University, the South Korean institutional member.

Advertisement of the 8th CIRIEC International Research Conference on Social Economy - San José, 2021 (CIRIEC collection)

4.3. The Edgard Milhaud Prize

After the award of the 3rd Edgard Milhaud Prize at the Rheims Congress (2016), the Praesidium expresses its disappointment with the effects of this award on the involvement of young researchers in CIRIEC's scientific work (due to the fact that young people prioritise their own incipient scientific careers and due to their inability to work on a voluntary basis, whereas participation in CIRIEC's work is exclusively voluntary). The prize is maintained, but reduced to €3,000 (instead of €5,000) with an obligation to make a contribution to CIRIEC. However, due to a lack of suitable candidates, the prize is not awarded in 2018. The absence of a congress in 2020 (due to the pandemic) has the de facto effect that the prize is not awarded that year either. It should normally be awarded again in 2022, on the occasion of the Valencia congress, as part of the celebration of CIRIEC's 75th anniversary.

4.4. Research Activities

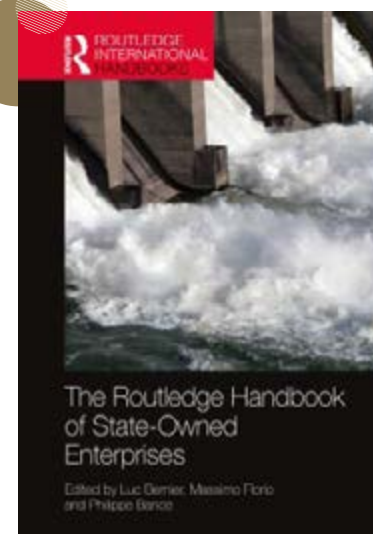
4.4.1. Public Economy Research

It is conducted mainly by the members of the Public Services/Public Enterprises commission, i.e. some 30 specialists (economists and lawyers) from around 20 countries (some also without a national section, e.g. Algeria, Ireland, Italy, Lithuania, the Netherlands, Sweden and Switzerland). In 2014, the commission is chaired by Massimo Florio (Università degli Studi di Milano, Italy). The coordination of the commission's research projects is ensured by a steering committee composed of the president, Philippe Bance (University of Rouen, then University of the Antilles, France), Luc Bernier (University of Ottawa, Canada) and Gabriel Obermann (Wirtschaftsuniversität Wien, Austria), then, as of 2017, in

anticipation of the latter's retirement, Ulf Papenfuß (Chair of Public Management and Public Policy at the Zeppelin University in Friedrichshafen, Germany).

As we saw in the previous chapter, the 2008 crisis was accompanied by a movement to 'renationalise' many private companies, which in turn led to a (re) broadening of the scope of the Public Enterprises commission. After examining the main public enterprises at national level, the commission turns, from 2016 onwards, to the question of the performance and governance of public enterprises and services of general interest. This new research is part of the EUsers project. Led by Massimo Florio and involving a network of six universities, it aims to disseminate innovative teaching approaches on the topic of services of general interest in the European Union from a citizen's perspective. Within this format, various discussion seminars are organised, including a Summer University in early summer of 2016, which involves around twenty experts from CIRIEC's scientific network but also young doctoral students¹⁹⁶. The International Centre is also involved in the organisation of the international conference that concludes the EUsers project: organised in Rouen on 9 June 2017, its title is «The governance of public organisations in the 21st century economy». Participation in the EUsers project is very positive for CIRIEC, especially because it offers the possibility to increase its visibility among young researchers¹⁹⁷.

In 2017, CIRIEC wins the European tender on the reform of public governance and public enterprises in Greece. It is intended to provide advice to the Greek Ministry of Finance to help it defend its position against the privatisation of all Greek public enterprises in its negotiations with the 'Troika' (European Commission, European Central Bank and International Monetary Fund).



In the same year, the scientific commission embarks on an ambitious publishing project that aims to remedy the lack of recent reference works on state-owned enterprises. The Routledge Handbook of State-Owned Enterprises is published in 2020¹⁹⁸ and is the result of more than two years of work by the commission. This handbook fills a gap, as it offers the first synthesis of the subject since the 1980s: it updates the data on the public sector and addresses many of the issues associated with it (role in public interest, activities at international level and their impact on the national economy, distinction from the private sector in terms of governance, etc.). Above all, it is

¹⁹⁶ 600 applications for this intensive week of courses were submitted for only 35 available places!

¹⁹⁷ A dozen young researchers join CIRIEC's scientific network in 2016.

¹⁹⁸ Luc Dierckx, Massimo Florio & Philippe Bance (dir), *The Routledge Handbook of State-Owned Enterprises*, [s.l.] Ed. Routledge, 2020, 678 p.

characterised by a new approach: after decades of publications on privatisation and governance from a mainstream perspective, this more heterodox book clearly highlights the importance of state-owned enterprises today (about 10% of global GDP). The 35 chapters examine these enterprises from multiple angles: activities, missions, governance, finance, research and development, etc. After three decades of privatisation, interrupted by the 2007-2008 crisis, today's public enterprises look different in many ways from the public enterprises of the post-World War II era. Nevertheless, they remain key players in many sectors and countries.

Since the end of 2019, working groups have been set up on the subject of public enterprises at all levels of power (representation of women, transparency and anti-corruption policies, re-municipalisation and territories). The working group coordinated by Professor Andrea Zatti (University of Pavia, Italy) on the subject of «Accountability, anti-corruption and transparency policies in Public Owned Enterprises (POEs)» is the only one that has managed - despite the difficulties caused by the pandemic - to complete its work in time and to organise an online seminar on 4 June 2020 (instead of the physical meeting planned in Thessaloniki, Greece) to discuss the progress of its work. The results of the work on a first set of six countries are to be published in early 2022.

Finally, at the instigation of the Austrian section, CIRIEC has organised a seminar on 21 March 2019 in Brussels on the taxation models to be applied to digital platforms so that they contribute fairly to the development of territories and their tax revenues. Under the direction of Marc Bourgeois, professor of tax law (Liège Tax Institute, HEC-ULiège), this seminar brings together some thirty experts.

4.4.2. Social and Solidarity Economy Research

Chaired since mid-2015 by Marie J. Bouchard (University of Quebec in Montreal, Canada), the 'Social and Cooperative Economy' commission is made up of nearly one hundred researchers. Since its inception, this network has expanded considerably and comprises not only countries where CIRIEC has a national section or an institutional member, but also researchers from Scandinavian countries (Denmark, Finland, Iceland, Norway), Central and Eastern European countries (Croatia, Czech Republic) and the United Kingdom. In addition, it also has members from the American continent (United States) and even Africa (Senegal). Since 2018, the commission has included CIRIEC partners among its members (representatives of international organisations in the social and cooperative economy who are often partners in international projects: UNTFSSSE, COPAC, ILO, ICA, etc.).

In terms of research, the commission studies the evolution and transformation of social economy organisations («Degeneration and regeneration of the social economy») from 2016 onwards. The results of its work are published in a thematic issue of the *Annals* in 2020¹⁹⁹.

199 Ignacio Bretos, Marie J. Bouchard & Alberto Zevi, *Social Economy under influence: Isomorphism or Innovation?*, AEPSC/APCE, 2020, vol. 91, n°3 (special issue), 146 p. (available online: <https://onlinelibrary.wiley.com/toc/14678292/2020/91/3>).

Satellite accounts of the social economy are also a central topic of interest. As we have seen previously, CIRIEC started investigating this fundamental subject in the 1990s and proposed a methodology for extracting structured 'satellite accounts' from national accounts in 2007. The reform of the European System of Accounts (ESA 2010), which is officially adopted in May 2013, requires a revision and updating of the methodology for satellite accounts of the social economy. On this occasion, it is important to make sure that the European Commission does not give in to pressure promoting the American understanding of the associative economy (defined as essentially non-profit and including all voluntary work)²⁰⁰ instead of the 'European' conception defended by CIRIEC, among others, which is meant to be broader and to include all mutual societies and cooperatives. In October 2017, at the invitation of the European Commission and the Organisation for Economic Co-operation and Development (OECD), a seminar («Towards satellite accounts for Third Sector and Social Economy: challenges and opportunities») is held in Paris and brings together experts, Eurostat representatives and national statistical offices of interested countries. CIRIEC actively participates in this meeting as two members of its scientific commission (Marie J. Bouchard and José Luis Monzón) present two of the three key concepts discussed. This meeting shows the importance of developing a 'CIRIEC' model of the satellite accounts of the social economy that will allow the establishment of a conception of the social economy that CIRIEC defends.



Two research projects are carried out in 2017 and 2018 in collaboration with CIRIEC-Spain, under the direction of Rafael Chaves and José Luis Monzón, in response to calls for tender issued by the European Economic and Social Committee (EESC). The first highlights recent developments in the social economy in Europe. Updating the work carried out by the two professors in 2006 and 2011, it also compares the social economy with other kindred concepts (solidarity economy, social enterprise, collaborative economy, circular economy, etc.). In 2017, it results in a report published in five languages (French, Spanish, English²⁰¹, Italian and Polish). The second study seeks to identify, on the basis of a selection of concrete cases ('best practices'), the various elements of public policy (legal, institutional, financing, training, etc.) that contribute to the development of the social economy and to draw up a typology. Once again, the resulting publication (in French, Spanish and English²⁰²) helps to disseminate the results of the work widely.

200 A definition based on the work of Lester Salamon, professor at the Johns Hopkins Center for Civil Societies Studies (University of Baltimore) and adopted by the United Nations.

201 Rafael Chaves & José Luis Monzón, *Recent Evolutions of the Social Economy in the European Union*, Brussels, EESC, 2017, 122 p. (available online: <http://www.ciriec.uliege.be/wp-content/uploads/2018/09/evol-recente-ES-UE-fr.pdf>).

202 Rafael Chaves & José Luis Monzón, *Best Practices in Public Policies Regarding European Social Economy Post the Economic Crisis*, Brussels, EESC, June 2018, 57 p. (available online: <http://www.ciriec.uliege.be/wp-content/uploads/2018/10/best-practices2018-FR.pdf>).

The commission, in the person of its president Marie J. Bouchard and some other members, was also heavily involved in the work of the Committee for the Promotion and Advancement of Cooperatives (COPAC). In October 2016, Marie J. Bouchard is appointed chair of a technical working group tasked with redefining the modalities for evaluating cooperatives worldwide. The methodological report²⁰³ is presented at the International Cooperative Alliance World Conference (Kuala Lumpur, Malaysia, 17 November 2017). Subsequently, the working group addresses the statistical classification of cooperatives and the definition of methods to measure their work and added value. The 20th International Conference of Labour Statisticians (ICLS) in October 2018 adopts various guidelines proposed by the working group for the statistical measurement of cooperatives. In the wake of the ICLS, a joint publication on the operationalisation of cooperative statistics at the global level²⁰⁴ is released by CIRIEC, COPAC and the ILO.



Measuring their impact has become a growing concern for social economy organisations over time. Indeed, they need to be able to assess the effects of their action and readjust it for greater efficiency; they also need to improve their visibility in order to have their impact recognised, particularly by donors. This is the challenge that the working group on impact measurement sets out to address. Coordinated by Marie J. Bouchard and Damien Rousselière, it is an extension of the work previously carried out by the commission on the value and importance of the social economy and has set itself the threefold objective of defining a methodology and indicators, evaluating the effects generated as well as the expectations and requirements of donors. Starting in 2020, a first series of results are published and disseminated in the form of *Working Papers* to an audience of both scientists and practitioners.

The contribution of the social and solidarity economy to the Sustainable Development Goals (SDGs) is another highly topical issue. Coordinated by a panel of five Spanish- and Portuguese-speaking professors²⁰⁵, a working group seeks to highlight how the action of SSE organisations and enterprises, guided by their values, makes an effective and integrated contribution to the SDGs.

²⁰³ Marie J. Bouchard, Madeg Le Guernic & Damien Rousselière, *Conceptual Framework for the Purpose of Measurement of Cooperatives and its Operationalization*, Geneva, ILO, 2017, 98 p. (available online: https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---emp_ent/---coop/documents/publication/wcms_578683.pdf).

²⁰⁴ *Statistics on Cooperatives. Concepts, Classification, Work and Economic Contribution Measurement*, Geneva, ILO-COPAC-CIRIEC, 2020, 95 p. (available online: https://www.ciriec.uliege.be/wp-content/uploads/2020/11/ILO-CIRIEC-COPAC-Publ_OK.pdf).

²⁰⁵ Leandro Pereira Morais (Universidade Estadual Paulista, São Paulo, Brazil), Juan Fernando Alvarez (Pontificia Universidad Javeriana, Bogotá, Colombia), Miguel Alarcon Conde (University of Castilla-La Mancha, Spain), Ana Miena Silva Valencia (Universidad ICESI, Cali and CIRIEC-Colombia), Duarcides Mariosa (Pontificia Universidade Católica e Campinas, Brazil).

Finally, another working group that brings together members of various CIRIEC sections (Spain, Colombia, Costa Rica, Brazil, Mexico, Portugal, etc.) as well as experts from several other countries partner up with the Ibero-American Observatory (OIBESCOOP) to publish an online book which, in the context of the emergence of various of social economy experiences in Latin America, Spain and Portugal, attempts to establish a typology of these experiences according to whether they proceed from a strategy of adaptation, resistance or opposition to the pressure from external factors caused by the political, economic, cultural and environmental changes inherent to globalisation²⁰⁶. Thirty-three authors co-author eighteen articles presenting the situation in fourteen countries.

4.4.3. Transversal working group



In 2016, on the fringes of the international congress in Rheims, a new transversal group is set up around a new subject for CIRIEC: the commons, i.e. the collective management of common resources (e.g. natural resources such as forests, seas, biodiversity) with the aim of deriving benefits from them while preserving them for the future. This model, which had become marginal as the role of managing (and preserving) resources had gradually been taken over by the State or the market (via privatisation), was brought back to prominence by the work of Elinor Ostrom, the first woman to be awarded the Nobel Prize in Economics (in 2009). There needs to be a reflection on how public economy or social economy organisations cope with these issues. This topic is totally in line with current events: the scientific reflections of the working group, coordinated by Philippe Bance, are echoed in citizens' demands

for a more responsible management of resources, as expressed in the climate marches that are taking place all over the world.

This research highlights that partnerships have been set up across the globe in recent years between public authorities and public and/or social economy enterprises with a view to producing or managing the commons and public goods together. These partnerships are accompanied by major changes in the behaviour of public and social economy organisations, as well as in the boundaries between these two sectors. The publication of these results marks the launch of a new collection of books, the *CIRIEC Studies Series*²⁰⁷, which is freely accessible via the CIRIEC website.

²⁰⁶ Juan Fernando Álvarez & Carmen Marcuello (dir.), *Experiencias Emergentes de la Economía Social*, Valencia, CIRIEC-OIBESCOOP, 2020, 507 p. (available online: <https://www.ciriec.uliege.be/wp-content/uploads/2021/10/experiencias-emergentes-de-la-economia-social-en-iberoamerica.pdf>).

²⁰⁷ Philippe Bance (dir.), *Providing Public Goods and Commons. Towards Coproduction and New Forms of Governance for a Revival of Public Action*, Liège, CIRIEC, 2018 (available online: <https://www.ciriec.uliege.be/wp-content/uploads/2018/03/CSS1BOOK.pdf>).

In order to further study the mechanisms identified, the transversal working group launched a new research programme at the end of 2018 with the aim of determining whether they reflect the emergence of a new collective action paradigm²⁰⁸. The result is a book published in 2022.

4.5. Refocusing of editorial policy

In the second half of the 2010s, CIRIEC broadens its editorial scope and explores a new type of publication: books that can be downloaded online. This innovation addresses several considerations: on the one hand, publishing in paper format often proves to be a lengthy process that prevents the swift dissemination of research results, particularly to practitioners to whom they could prove directly useful. On the other hand, as we have seen, the International Centre is in a difficult financial situation and the publication of books in the *Social Economy and Public Economy* series with Peter Lang is a significant cost. Therefore, CIRIEC launches a new series in 2018: the *CIRIEC Studies Series*, which offers online research results in social economy and public economy. As mentioned above, *Providing public goods and commons...* is the first book to be published in this new format.

Nevertheless, this new initiative does not signal the end of CIRIEC's collection with Peter Lang, which publishes a 7th issue in the summer of 2018: *Social and Solidarity-based Economy and Territory: from Embeddedness to Co-construction* brings together contributions from 33 authors²⁰⁹. Based on the results of the Social Economy working group, it illustrates the various strategies put in place by the SSE within territories in order to respond to socio-economic or political changes, notably through re-invented cooperations.

Since 2007, *Working Papers* have been CIRIEC's third type of publication: as a reminder, they are published electronically and in a number of languages at the rate of a dozen on average per year and aim to rapidly disseminate first research results or revised versions of papers presented at research conferences or seminars. Since 2016, this publication has been under the editorial responsibility of Marie J. Bouchard, Fabienne Fecher, Massimo Florio and Marco Marini. Listed on two referencing portals: RePEc (Research Papers in Economics) and Econbiz dedicated to research in economics, they greatly contribute to CIRIEC's visibility. At the end of 2021, the number of *Working Papers* available on CIRIEC's website amounted to 186²¹⁰.

208 The title is 'The joint production and co-production of public goods and commons in the contemporary context of destruction prompting public action: Source of a future paradigm shift for collective action?'

209 Nadine Richez-Battesti & Xavier Itçaina (dir.), *Social and Solidarity-based Economy in Territory: from Embeddedness to Co-construction*, Brussels, Peter Lang, Coll. Social Economy & Public Economy, n° 7, 2018, 374 p.

210 see CIRIEC website: <http://www.ciriec.ulg.ac.be/publications/wp/>



Entrusted to an external publisher²¹¹, the *Annals of Public and Cooperative Economics* are still one of CIRIEC's main showcases. The review has had unparalleled influence since its creation, thanks in particular to its listing in major international indexes in human and social sciences and to growing access to its electronic version. In general, a thematic issue is published each year. It is often devoted to the results of recent work by the two scientific commissions: in addition to *Organization and Governance in Social Economy Enterprises* (2016), referred to above, we should also mention issues devoted to the contribution of the social economy to sustainable development (2017)²¹², the importance of state-owned enterprises (2018)²¹³, public-private partnerships (2019)²¹⁴, the contrasting trajectories of social economy structures (2020)²¹⁵, the New Age of the Commons (2021)²¹⁶.

While its editorial policy remains in line with that of the past, the review undergoes several small revolutions in the second half of the 2010s. On 1 January 2016, after 15 years as editor of the *Annals*, Fabienne Fecher passes the torch to Marco Marini, Professor of Economics at La Sapienza University in Rome. The man is by no means a stranger to CIRIEC: he has been active for many years in the scientific commission 'Social and cooperative economy' where he coordinated a working group (on corporate governance). He also has editorial experience as he is a member of the editorial board of the journal published by CIRIEC-Spain and was one of the editors of two special issues of the *Annals* in 2015 and 2016: *Governance of Non-Profit and Non-Governmental Organizations and Organization and Governance in Social Economy Enterprises* (see Chapter IV). The new editor-in-chief is supported by a team of six associate editors, who are themselves advised by an advisory committee comprising representatives of CIRIEC's scientific bodies, and he enjoys the invaluable support of an editorial board comprising some fifty

211 DeBoeck from 1989 to 1994, Blackwell from 1995 to 2007, when Blackwell is acquired by Wiley. The edition is published under the name Wiley-Blackwell between 2008 and 2016, and then under Wiley.

212 Benjamin Huybrechts & Marek Hudson, *Social Economy and Sustainable Development*, AEPSC/APCE, 2017, Vol. 88, n°2 (special issue), 162 p.

213 Eoin Reeves (dir.), *The Continuing Importance of State-Owned Enterprise in the 21st Century: Challenges for Public Policy*, AEPSC/APCE, 2018, Vol. 89, n°3 (special issue), 108 p.

214 Eoin Reeves, Donal Palcic & Matti Siemiatycki, *The Performance and Potential of Public Private Partnerships*, AEPSC/APCE, 2019, Vol. 90, n°2 (special issue), 198 p.

215 Marie J. Bouchard, Ignacio Bretos & Alberto Zevi, *Social Economy under Influence: Isomorphism or Innovation?*, AEPSC/APCE, 2020, Vol. 91, n°2 (special issue), 146 p.

216 Philippe Bance & Jérôme Schoenmaeckers (dir.), *The New Age of Commons...*, op. cit.

internationally renowned scientists. In 2018, a symbolic year, since it marks the 110th anniversary of the review, it experiences an institutional upheaval, as we have seen, with its transfer to the Edgard Milhaud Foundation. However, October 2019 is the date that marks a milestone for the *Annals*. They are included in the *Social Sciences Citation Index*, an objective pursued for more than a decade! Moreover, a few months later, they are awarded a high impact factor (1.271). However, this valuable recognition at international scientific level is not acquired once and for all and requires the review to constantly redefine its objectives. Thus, in 2019, the review sets itself an ambitious programme for 2023: halving the number of self-citations, increasing the number of article submissions by 50% and the number of published papers by 10%. In addition, various strategic questions are being asked. Is it appropriate to maintain a bilingual publication, in French and English, when the latter is generally more prevalent in scientific journals? Publication in French (which is one of the specificities of the review) is maintained, but in a minor mode, in proportion to the number of submissions. Finally, it appears necessary to make a choice between a review that is strictly 'economic' or one with an interdisciplinary vocation. While CIRIEC intends to give priority to the economic aspect, it does not wish to entirely forego contributions from other disciplines.



Announcing the first Annals impact factor on the Wiley website in 2019

The review's global circulation continues to grow as a result of Wiley's strategies, which include penetrating new markets and attracting new authors from emerging countries. By June 2021, the *Annals* are available in some 7,500 institutions worldwide, an increase of almost 37% since 2018.

4.6. Life and activities of CIRIEC sections

As we have seen in the previous chapters, national sections are the key components of the CIRIEC machine and a large part of CIRIEC's scientific activity takes place with their help and/or within them. It is obviously impossible to provide an exhaustive account of their work in the scope of the present publication. We would therefore like to provide a simple overview of the various sections' main areas of activity. For the sections created in the last five years, please refer to part 2.1.

4.6.1. CIRIEC-Argentina

2016 is a special year for the section: IAIES celebrates its half-century of existence by organising an international seminar on the social economy, which



inaugurates a cycle for CIRIEC-Argentina's regional offices²¹⁷ and which, in the following year, will result in a special issue of the section's journal: *Cuadernos de Economía Social*. The section also opens two branches in cooperatives, one in Bahía Blanca (in the province of Buenos Aires) and the other in Santiago del Estero, the capital of the same province. In mid-September 2017, a second seminar is held in the spa town of Río Hondo on the topic «The identity of regional economies and the development of the social, public and cooperative economy»²¹⁸.

4.6.2. CIRIEC-Austria

Representing more than 100 companies providing services of general



Rainer Plassmann, Heidi Maier and Inge Reichert (Barbara Sak collection)

interest, the Austrian Association of the Public and Collective Economy (VÖWG), which is also a member of CEEP²¹⁹, plays an important lobbying role to defend the interests of its members at national and European level. Under the leadership of Heidrun Maier De Kruijff, the section's secretary general since 2010, it is involved in a number of European projects (CETA, General Data Protection Regulation (GDPR), directives on the re-use of public sector information, e-commerce, drinking water, action

plan on financing sustainable growth, etc.) by means of studies, proposals for measures or amendments, and assists its members in complying with legislative changes. During the period, the Austrian section conducts various research on affordable housing and collaborates in several initiatives in this field (working group on social housing set up by Eurocities, Lyons Appeal for a European Action Plan on Affordable Housing). It is at its instigation that CIRIEC tackles the issue of taxation of digital companies and platforms during a seminar held in Brussels in March 2019. VÖWG members are particularly interested in this topic because of the negative impacts of this 'virtual' economy on housing prices in city centres and on the financing of social benefits provided by the State. The VÖWG would

²¹⁷ 50 Aniversario IAIES: «La Economía Pública, Social y Cooperativa: Oportunidades para un desarrollo evolutivo», *Cuadernos de Economía Social*, n° XV-20 (special issue), 246 p.

²¹⁸ «Identity of regional Economies in the Development of the Social, Public and Cooperative Economy – hopeful Vision of a new Economy» (Río Hondo, 15-16 September 2017).

²¹⁹ European Centre of Employers and Enterprises providing Public Services and Services of General Interest, renamed SIG-Europe in December 2020.

like to use the results of this seminar to submit a policy paper to the Austrian government.

4.6.3. CIRIEC-Belgium

As in the past, the Belgian section provides important administrative support to CIRIEC International and carries out various research activities in the period 2016-2021. As mentioned above, the section organises the 32nd congress of CIRIEC, which takes place in Liège from 30 May to 1 June 2018. A year earlier, it had organised a prestigious event at the University of Liège on the occasion of the triple anniversary of CIRIEC, namely: the 70th anniversary of the creation of the International Centre by Edgard Milhaud (12 February 1947), the 65th anniversary of CIRIEC-Belgium²²⁰ and the 60th anniversary of the transfer of the headquarters of the International Centre from Geneva to Liège (1957).



Discussion between Hajime Imamura, Jacques Fournier and Munenori Nomura at the 32nd CIRIEC Congress - Liège, 2018 (CIRIEC collection)

In 2020, after more than four decades in office, Leona Detiège passes the torch of the presidency of CIRIEC-Belgium to Marie-Pierre Fauconnier, CEO of Sibelga, and becomes Honorary President. However, following Marie-Pierre Fauconnier's resignation, vice-president Koen Albregts, former secretary of the Algemeen Christelijk Vakverbond - Limburg (ACVL - General Christian Trade Union of Limburg), takes over the interim presidency at the end of 2021.

4.6.4. CIRIEC-Brazil

The organisation of the 6th Social Economy Research Conference in Manaus (see above) is a good calling card for the new CIRIEC section, as it now approaches various public institutions, including the government of the State of Bahia, which becomes a project partner. The conference also triggers a deep internal reflection following the observation that the Brazilian interventions are too ideological and of an insufficient scientific level. In collaboration with CIRIEC-Portugal, the section then sets about publishing an international scientific journal *Cadernos CIRIEC-Brasil* and organising its first congress on the social and solidarity economy. On account of the coronavirus pandemic, the 'CIRIEC World Conference in

Latin America' is held online, from 13 to 16 April 2021, on a subject that could not be more topical: The social and solidarity economy as a model for inclusive, sustainable and resilient development in a post-Covid-19 world.

4.6.5. CIRIEC-Canada

Presided over by Léopold Beaulieu, CIRIEC-Canada is very active in the organisation of seminars and conferences. It publishes a review (*Économie et Solidarités*) and a newsletter on social economy research (*ECO-SOC Info*). Particular achievements during the period include the organisation of a symposium on «Social Economy and Solidarity Finance» on 4 February 2016 at the University of Quebec in Montreal (UQAM). It celebrates four anniversaries: the half-century of the Canadian section, the 45th anniversary of the Desjardins cooperatives, the 30th anniversary of CRISES (Research Centre on Social Innovations) and the 20th anniversary of *Fondaction*. A publication commemorates the latter anniversary²²¹. In the following years, the section increases its collaboration with CRISES and TIESS (*Territoires innovants en économie sociale et solidaire*) and conducts research on the issue of the commons, which results in a forum in 2019²²². As a reminder, the Canadian section is strongly involved in the various activities of CIRIEC and particularly in the work of the two scientific commissions, 'Social and Cooperative Economy' and 'Public Services / Public Enterprises', in the person of Marie J. Bouchard, who has chaired the former since 2015, and Luc Bernier. We should also mention a tribute to the career of Benoît Lévesque, published in October 2021²²³.

4.6.6. CIRIEC-Colombia

On the eve of its tenth anniversary, the Colombian section is doing well. It has succeeded in recruiting new members and has redesigned its website. It has a regular publication activity and a review *Cuadernos de desarrollo rural*. It has also established various collaborations for the development of the social and solidarity economy (Federación de Empresas de Economía Social y Solidaria - FESOC) and for educational purposes: for example, with the Federation of Cooperatives in the Educational Sector (FENSECOOP), it has created an observatory on the social economy in Colombia, which highlights, among other things, the contribution of this sector to the peace process in the country, an achievement that it holds

221 Benoît Lévesque (dir.), *Fondaction : un fonds pleinement engagé dans la finance socialement responsable* [Fondaction: a fund fully committed to socially responsible finance], Quebec, Presses de l'Université de Québec, Coll. Innovation sociale, 2017, 409 p.

222 « Nos organisations face à la 4e révolution industrielle – Reconnaître la contribution au bien commun des pouvoirs publics et des entreprises collectives » [Our organisations facing the 4th industrial revolution - Recognising the contribution of public authorities and collective enterprises to the common good] (UQAM, 29 April 2019).

223 Marie J. Bouchard, *L'innovation et l'économie sociale au cœur du modèle québécois. Entretiens avec Benoît Lévesque* [Innovation and the social economy at the heart of the Quebec model. Interviews with Benoît Lévesque], Quebec, Presses de l'université du Québec, Coll. *Politeia*, 2021, 408 p.

220 Although the Centre for Research and Information on the Collective Economy in the Province of Liège (the forerunner of the Belgian section) existed as early as 1951, its statutes were not published in the *Moniteur Belge* [Official Journal] until 1952.

dear²²⁴. Juan Fernando Álvarez (Catholic University of Colombia, Bogotá), a member of the CIRIEC-Colombia steering committee, also attends the meetings of the Nobel Peace Prize Committee in Minneapolis (USA) in September 2017. In addition, the section plays a significant role in strengthening CIRIEC on the Latin American subcontinent by establishing partnerships with structures in Ecuador and Costa Rica.

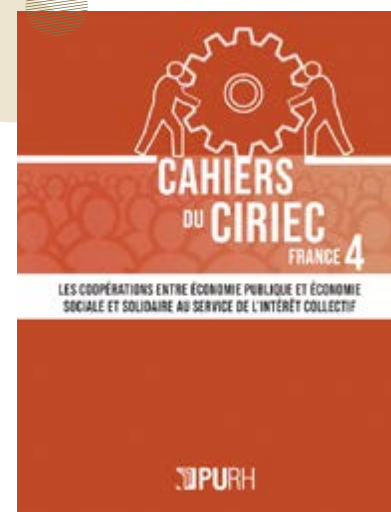
4.6.7. CIRIEC-Spain

With some 300 members, CIRIEC-Spain, which celebrates its 30th anniversary in 2016²²⁵, is one of the leading sections on the European continent. It publishes or actively collaborates in three scientific reviews²²⁶ and also distributes its electronic newsletter, a weekly publication that is now in its 600th issue. It is the only one in Spain to provide theoretical data and information on the social economy (for politicians and academics). The section is very active: it organises a congress of researchers in the social and cooperative economy and the Iberian Conference on Cooperativism and the Social Economy every year in alternation (i.e. the congress in one year and the conference the following year) and publishes numerous books and reports. Its executive director, José Luis Monzón Campos, and Rafael Chaves, president of its scientific commission (both professors at the University of Valencia), spearhead many of the research initiatives undertaken by CIRIEC. The section has no shortage of ambitious projects either. After founding the Ibero-American observatory OIBESCOOP in 2003 (see Chapter III), it creates a portal for social responsibility, social entrepreneurship and the economy of the common good in 2017, in collaboration with the Generalitat Valenciana. Based on the analysis of recent initiatives, this portal aims to contribute to the important global debate on the need for an economic paradigm shift towards formulas that take into account parameters beyond profitability, such as a person's dignity, respect for communities, environmental protection and the fight against climate change²²⁷. Among the recent achievements of the section under the impetus of its new president, Adoración Mozas Moral, professor at the University of Jaén, are the production of a handbook on satellite accounts of the social economy for statistical institutes and the launch, in collaboration with CIRIEC International, of a European magazine on the social economy, *Social Economy News*, which is expected to promote, at the European level, the universal conception of the social

economy defended by CIRIEC (including cooperatives, mutuals, associations and foundations).

4.6.8. CIRIEC-France

Under the presidency of Alain Arnaud, the French section, CIRIEC's oldest (it celebrates its 70th anniversary in 2020), has increasingly focused on the convergence and partnerships between the social economy and the public economy, in particular with the launch of action research on this topic by organising regular public dinner-debates. As part of the international



congress it organises in Rheims in 2016, CIRIEC-France publishes a book that critically examines the notion of the 'State as a Strategist' in the light of the French case²²⁸. Three years later, it contributes to the ongoing reflection on the education system in France with a book entitled *Éducation et intérêt général*²²⁹. The section also organises regular scientific events: international conferences («The governance of public organisations in the 21st century economy» - Rouen, 2017 and «Finance and general interest...», Bercy, 2019, both in collaboration with CIRIEC International) and colloquia («Ageing well with digital technology» in 2017; «Crossed views on the railway reform» in 2018, etc.). In 2019, it launches two new initiatives: the CIRIEC-France Agoras, seminars dealing with topics of interest to the social and solidarity

economy (territorial dynamics, public policies and the SSE in Europe, etc.) and the *Cahiers du CIRIEC-France*, a biannual publication aiming to increase the visibility of its work, without forgetting the *Brèves du CIRIEC-France*, which continues to be published monthly.

4.6.9. CIRIEC-Japan

CIRIEC-Japan's headquarters, which were previously located at the University of Tokyo, are moved to Nagoya Gakuin University in Aichi from 2016 to 2019, and then to Osaka University in 2020. However, this double relocation has no impact on the activities, which remain focused, on the one hand, on the organisation of spring meetings (in March) and an annual research conference (in December), and on the other hand, on the publication of the journal *Kokusai-kokyo-keizai-kenyu* (International Public Economy Studies). The profound changes in economic and

²²⁴ The development of the cooperative sector played an important role in the Colombian peace process, as it provided work for former guerrillas and thus helped to keep them away from armed struggle.

²²⁵ The review *Noticias de la Economía Pública Social y Cooperativa* publishes a special issue on the occasion of this anniversary: *CIRIEC-España 1986-2016* (n°56).

²²⁶ *CIRIEC-España, Revista de economía pública, social y cooperativa; Revista Jurídica de Economía Social y Cooperativa; Noticias de la Economía Pública, Social y Cooperativa, Noticias del CIDEA* (with IUDESCOOP), to which should be added the (monthly) newsletter of the Spanish Social Economy Observatory: *Boletín Jurídico de la Economía Social* and the (electronic) weekly *Boletín de Actualidad del Observatorio Español de la Economía Social*.

²²⁷ General presentation of the portal: <http://www.economiasostenible.org> [most recent consultation: 14 June 2021].

²²⁸ Philippe Bance (dir.), *Quel modèle d'État stratège en France ?* [What model for a Strategist State in France?], [s.l.] Presses universitaires de Rouen et du Havre, 2016, 426 p. (available online: http://www.ciriec.uliege.be/wp-content/uploads/2017/11/etat_strategie_open.pdf).

²²⁹ Philippe Bance & Jacques Fournier (dir.) *Éducation et intérêt général* [Education and general interest], [s.l.], Presses universitaires de Rouen et du Havre, 2019, 702 p.

societal systems that Japan has experienced in recent years have prompted the section to focus on the topic of re-municipalisation. It has also initiated a Think Tank on new global innovation systems.

4.6.10. CIRIEC-Portugal

In recent years, the section has continued its traditional activities, including the organisation (in partnership with CIRIEC-Spain) of the Iberian Social Economy Colloquium (the 2016 and 2019 editions are held in Lisbon). It also actively supports the young Brazilian section in the organisation of the International Social Economy Research Conference in Manaus in 2017. In the same year, it is involved in the preparation of the 1st Social Economy Congress in Portugal (14 November 2017) and collaborates with the Autonomous University of Lisbon in a new initiative: the Social Economy Summer Universities. As of 2017-2018, the section produces studies to support mutuals on health issues and especially the recourse to digital solutions, and collaborates with the Confederation of Cooperatives, Mutualities and Private Social Security Associations. On the institutional side, the section adopts new statutes in 2016 in order to better involve enterprise managers. Today, it has about 100 (individual and institutional) members. In 2019, the section celebrates its 40th anniversary and publishes *A Economia Social numa visão plural*²³⁰ on this occasion, a compilation of about 100 texts taken from the weekly column that the section has published for several years in *Negócios*, Portugal's main economic daily. The book is dedicated to Jorge de Sá, the section's president (and former director), who had died recently. His last contribution was a book about solidarity banking²³¹. Manuel Belo Moreira (professor at the Instituto Superior de Agronomia - Universidade de Lisboa) is now the section's president.



4.6.11. CIRIEC-Venezuela

During this period, Venezuela sinks into a deep economic crisis that is further exacerbated by the economic sanctions and the oil embargo imposed by the United States against Nicolás Maduro's government. Faced with hyperinflation

(which peaks at 10,000,000% in 2019), Venezuela suffers from a shortage of food and medicines, which drives almost 10% of the population (including a significant proportion of skilled workers) to flee the country. This context weighs on the scientific activities of the section, which finds it impossible to maintain the publication rate of its review *Cayapa. Revista Venezolana de Economía Social* and is forced to replace its traditional annual symposium (organised within the framework of the Convention of the Venezuelan Association for the Advancement of Science - ASOVAC - and widely successful) with a virtual event. Nevertheless, it continues its research work and publishes a contribution on Venezuelan public policy on water supply in the collective work *Social and Solidarity-based Economy and Territory* published by CIRIEC (see above). On the other hand, financially exhausted, it is utterly unable to pay its dues, and had already experienced recurrent difficulties in this regard. Temporarily suspended by decision of the International Board meeting in Valencia (Spain) on 18 October 2016, it continues to participate in CIRIEC's activities, but is no longer associated with its governing bodies.

4.7. International collaborations and partnerships



Barbara Sak at the ICA and ILO conference «Cooperatives and the future of work» in Geneva - June 2019 (CIRIEC collection)

Since its creation in 1947, CIRIEC has always sought to establish contacts and partnerships with international institutions dealing with the public or social solidarity economy (ILO, ICA, etc.). For decades, however, these contacts were rather informal, limited to the exchange of information or reciprocal invitations and occasional participation in each other's activities. At Jorge de Sá's instigation, CIRIEC

has strongly reinforced this dimension of its activity over the last decade, and especially in recent years, and has ensured that these contacts are translated into official institutional partnerships in which it asserts its scientific contribution. These partnerships guarantee extraordinary visibility at international level. Above all, they are an opportunity to promote its broad conception of the public, social and solidarity economy within international structures that are involved in political decision-making, as opposed to the more entrepreneurial (social business) or philanthropic Anglo-Saxon conception commonly favoured by certain European or international institutions. In this sense, the International Centre is partly reconnecting with the political dimension of its action, as envisaged by Edgard Milhaud when it was founded.

²³⁰ José Alberto Pitacas & Luis Reto (dir.), *A Economia Social numa visão plural* [A plural vision of the Social Economy], [s.l.], CEEPS (CIRIEC-Portugal), 2020, 239 p. (available online: https://www.cases.pt/wp-content/uploads/2020/03/A-Economia-Social-numa-vis%C3%A3o-plural_CIRIEC-PT_2020.pdf).

²³¹ Jorge de Sá, *Banca Solidária. Por um Banco Português e da Economia Social* [Solidarity Banking. For a Portuguese and Social Economy Bank], Lisbon, CEEPS, 2018, 86 p.

This is also the perspective from which CIRIEC's decision to respond to the European Commission's 2018 call for applications to renew (for six years) its Expert Group on Social Economy and Social Enterprises (GECES) should be seen. Rafael Chaves has been given the task of defending CIRIEC's positions and values within this group, which is responsible for reflecting on the major challenges facing the social economy and on the policy that Europe will implement in the coming years with regard to social enterprises and social innovation.

Similarly, the historical links²³² between CIRIEC and the European Confederation of Municipal Public Energy Distributors (CEDEC) have been further strengthened, with CEDEC becoming an observer member of CIRIEC in 2020.

4.7.1. SSE International Forum (former Mont-Blanc Meetings) and Social Economy Europe (SEE)

Since 2013, a collaboration has been established around the organisation of the International Forum Social and Solidarity Economy (SSE-IF) which became a tripartite institutional partnership when, in 2015, the International Forum joined forces with Social Economy Europe (SEE). After joining the steering group that organises the event, Marie J. Bouchard becomes a full member of the SSE International Forum's scientific council. However, CIRIEC's participation in the 2017 edition of the Forum (in Archamps, France) ended on a mixed note. Although the forum achieved its networking objective, CIRIEC cannot help but observe that it was rather poor in scientific terms and that CIRIEC's contribution in this regard was not fully appreciated. It is therefore clear that its interests are not really compatible with those of the SSE-IF, which is essentially a political and interest-promoting organisation for large SSE groups, especially in France and Quebec. The partnership was questioned for a while, but was finally maintained after the SSE International Forum redefined its strategy and realised that it was essential to maintain a scientific dimension, but with outside input. Since 2020, a synergistic partnership has been developed that allows the Meetings to benefit from the strengths of both institutions: CIRIEC's scientific insight and the SSE-IF's capacity to influence.

At the same time, CIRIEC has signed a new bilateral partnership with Social Economy Europe and therefore participates in some of its events, including the meeting «Social Economy, an Enterprise Model for the Future of Europe», organised on 23 May 2017 in Madrid by SEE and the Spanish Confederation of Social Economy Enterprises (CEPES), in collaboration with the Spanish Ministry of Employment and Security. This important political event brings together various ministers in charge of the social economy and aims to highlight the role that the social economy can play as a promoter of employment in the recovery from the crisis.

²³² Fritz Gautier, founding president of CEDEC was also president of CIRIEC from 1994 to 1998.

4.7.2. International Labour Organisation (ILO)

Since 2010, CIRIEC has taken an active part in the Interregional Academies that the ILO organises annually for public officials in order to address, in one week of training, all possible aspects of the social and solidarity economy. This event aims to stimulate the exchange of experience between policy makers, SSE actors, representatives of trade unions and employers' organisations, etc. After San José (Costa Rica) in 2016, Seoul (South Korea) and Luxembourg in 2017, Turin and Madrid in 2019, the 12th Academy, co-organised in 2021 with Portugal, is held online. CIRIEC, in the person of Professor L. Pereira Morais (UNESP University in Araraquara, Brazil), co-edits the manual on the social and solidarity economy and is responsible for organising one of the sessions.

The partnership with the ILO has been further strengthened, as mentioned above, through the development of joint activities, including those with the Committee for the Promotion and Advancement of Cooperatives (COPAC)²³³.

At the end of 2020, on the occasion of the centenary of the creation of the 'Cooperative' unit within the ILO, CIRIEC publishes a special electronic issue of the *Annals of Public and Cooperative Economics* containing an anthology of articles that this review has devoted to cooperatives since its origins²³⁴.

4.7.3. United Nations Organisation

In recent years, CIRIEC has also succeeded in having its expertise recognised within various United Nations structures. The partnerships set up in this context are particularly consistent with the objectives defined by the 2030 Agenda for Sustainable Development.



In 2018, CIRIEC, in the person of Jorge de Sá, and later (after his death) Barbara Sak, becomes an observer member of the United Nations Inter-Agency Task Force on Social and Solidarity Economy (UN-TFSSE). Created in 2013 in Geneva, this task force aims to increase the visibility of the social and solidarity economy, to have its contribution to the economic, social and environmental dimensions of sustainable development (SDGs) recognised and to put in place measures for its development. This is a real opportunity for CIRIEC insofar as it works alongside

²³³ This institution for the promotion of the cooperative sector comprises five international organisations: the International Cooperative Alliance (ICA), the International Labour Office (ILO), the Food and Agriculture Organisation of the United Nations (FAO), the United Nations Department of Economic and Social Affairs (UN-DESA) and the World Farmers' Organization (WFO). One of its objectives is to highlight the role of cooperatives as actors in sustainable development.

²³⁴ *Cooperatives and the ILO over 100 Years : A Selection of 12 Articles*, AEPSC/APCE, Sep 2020, 154 p. (available online: [https://onlinelibrary.wiley.com/doi/toc/10.1111/\(ISSN\)1467-8292.iilo-coop-100](https://onlinelibrary.wiley.com/doi/toc/10.1111/(ISSN)1467-8292.iilo-coop-100)).



more than fourteen UN agencies (FAO, ILO, UNESCO, UN Women, etc.), as well as the OECD and the World Bank, etc., plus ten or so observer members (European Economic and Social Committee, World Social Economy Forum, etc.), which ensures its positioning on the world stage. It thereby gathers strategic and political information even before decisions are taken. Several CIRIEC members give a presentation on sustainable development at a major international conference organised by the UN-TFSSE in Geneva as part of the centenary of the International Labour Office (25-26 June 2019).

Close collaboration is also established with the United Nations Research Institute for Social Development (UNRISD), notably on projects related to the statistical measurement of cooperatives at the global level. This is again an important issue for CIRIEC as UNRISD plays a leading role in a series of initiatives launched by the United Nations in the field of the social and solidarity economy. Following the adoption of guidelines on the statistical measurement of cooperatives at the 20th International Conference of Statisticians (ICLS) in 2018 (see above), a CIRIEC-UNRISD working group is set up in 2019 on 'Statistics and SSE'. Logically, Marie J. Bouchard, a specialist in the field, leads the research. The results are three publications²³⁵ that are presented in numerous conferences and online webinars in the second half of 2021.

Further negotiations are still underway with other institutions at European or international level, with a view to formalising CIRIEC's long-standing relations with them into institutional partnerships. This is the case with the International Cooperative Alliance (ICA) and the International Alliance of Mutualities (IAM), to name but two examples.

235 Marie J. Bouchard & Gabriel Salathé-Beaulieu, *Producing Statistics on Social and Solidarity Economy The State of the Art*, [s.l.], UNTFSSSE-UNSRID, August 2021, 62 p. (available online: <https://www.ciriec.uliege.be/wp-content/uploads/2021/09/WP-2021-SSE-Stats-Bouchard-Salathe-Beaulieu.pdf>); Coline Compère, Barbara Sak & Jérôme Schoenmaeckers, *Mapping International SSE Mapping Exercises*, [s.l.], UNTFSSSE-UNSRID, August 2021, 31 p. (available online: <https://www.ciriec.uliege.be/wp-content/uploads/2021/09/WP-2021-SSE-Stats-Compere-et-at.pdf>); Rafael Chaves, *Producing Statistics on Social and Solidarity Economy : Policy Recommendations and Directions for Future Research*, [s.l.], UNTFSSSE-UNSRID, August 2021, 24 p. (available online: <https://www.ciriec.uliege.be/wp-content/uploads/2021/09/WP-2021-SSE-Stats-Chaves-Avila.pdf>).



CONCLUSION

Founded in the very particular context of the post-WWII period, with the objective of building a international network capable of gathering scientific information and arguments to promote the development of the public, social and cooperative economy, CIRIEC has not failed in its task. It is true that it did not become the body in charge of the collective economy within the United Nations, as its creator had once dreamed. This has not prevented it from maintaining its specificity (unique among economic institutions) of covering both the public economy and the social and cooperative economy, and from continuing, throughout its existence, the David versus Goliath struggle begun by Milhaud: i.e. to ensure visibility and support for those sectors of the economy that try to oppose, in the name of the general and collective interest, the prevailing capitalist conception of the economy, which may be equated with unbridled competition, the primacy of capital, profit at any price and the rejection of solidarity-based mechanisms.

Over the course of the (almost) eight decades described above, this endeavour has had to adapt to a context that has undergone profound changes: public enterprises, which had a strong foothold at the end of the 1940s, lost ground and were obliged to transform into new structures adopting the operating methods of private enterprises, a model from which they have partly freed themselves by showing their capacity to become an engine of recovery during the 2008 crisis and, more recently, the coronavirus pandemic. For its part, the social economy, which was completely disregarded at the time, is now in vogue (although still much less so in systemic conceptions). It is increasingly seen as a credible alternative during economic crises and as a way of actively participating in democratic revival. In the militant form of the solidarity economy, it is experiencing extraordinary growth, particularly in Latin America. At the same time, new hybrid forms between the public and social economies have emerged, and recent years have seen the explosion of the so-called collaborative economy, in which non-profit exchanges of goods and services between individuals coexist with strictly commercial platforms.

Analysing these upheavals at the international level and their particular impact in certain countries; providing specialised expertise on the phenomena underway; monitoring the new forms taken by the public, social and solidarity economies; studying their contribution to general or collective interest and exposing the potential capitalist drifts of certain new models; drawing lessons from the success or failure of new initiatives, etc., such was the enormous task that CIRIEC has carried out (and still is).

But this intellectual contribution is only meaningful if it feeds into field practice and vice versa. Therefore, as in the past, CIRIEC aims to be a link between scientists and practitioners (managers and actors in the public, social and solidarity economy, political decision-makers, etc.). The work of the former is intended to respond to the concerns and development needs of the latter. The

activities carried out by CIRIEC (including by its constituent sections) in terms of disseminating the results of its research have no other purpose and take a wide variety of forms (publications, including the *Annals*, conferences, congresses which increasingly include workshops bringing together scientists and field actors, etc.). In this sense, it fulfils the objective assigned to it by Milhaud, namely: to do a work of "synthesis", to participate in broadening «the horizons of the men of action» and thus to aim for «the fruitful coordination of activities»²³⁶.

CIRIEC has not escaped the professionalisation that has affected the associative and academic world over the past fifty years. This is reflected by the increasingly scientific turn taken by its structure and in particular by its review, the *Annals of Public and Cooperative Economics*. This transformation was dictated both by a concern for international recognition and by financial necessity. Moreover, in a European Union characterised by a highly formatted decision-making process, it is likely that this shift towards a high-level scientific institution was essential if we were to have any hope of influencing the economic policies put in place. This shift was accompanied by the loss of some of the militant commitment that characterised CIRIEC's first leaders, Edgard Milhaud and Paul Lambert, and undoubtedly cut the organisation off from the activist associative sector (Committee for the Cancellation of Illegitimate Debts, Attac, etc.), which could have been allies in expanding its network. It is therefore surprising that CIRIEC has not become more involved in the Social Forums and the anti-globalisation movement (including the numerous trade union initiatives) which, in the early 1990s, were pursuing the same objective of opposing capitalism without a human face. The divergence of interests that emerged in the partnership with the SSE (Social and Solidarity Economy) International Forum in 2017 is another example. Both of these are evidence of the dialectics between scientific work and political action.

Today, as in the past, CIRIEC relies on the former and hopes, through the quality of its scientific work, to foster the deployment of the latter. However, over the course of its history, it has shown a greater desire to exert direct influence. This is evidenced in particular by the increase, in the 1990s, in the number of research projects conducted on behalf of decision-making bodies (European Commission, European Parliament, European Economic and Social Committee, etc.). Since the mid-2000s (and particularly during the past decade), this has also been one of the objectives of the more active policy of partnerships with global institutions (UN, ILO, etc.) active in lobbying and/or decision-making in the public, social and solidarity economy sectors.

It is a challenge to study the precise impact that CIRIEC's research has had on international or European policy on the collective economy. However, although it is difficult to demonstrate, its role in defending the general interest and

public services that are not stripped of their substance or universality is no less undeniable. It has been reflected in its constant criticism of the European Union's policy of privatisation of public enterprises and their exposure to competition. It is also manifest in the highlighting of the essential role that the public sector and the social economy play in providing a response to the basic needs of the population in all crisis situations (from the 1970s to the recent health crisis, including the 2008 financial crisis). The promotion of satellite accounts for the social economy, the fresh look provided by the *Handbook on State-owned enterprises* or the recommendations of the seminar on the taxation of digital platforms are just three of the building blocks CIRIEC has recently added to the solid (because scientifically backed) bulwark against attempts to destabilise the public, social and solidarity economies.


This bulwark needs to be consolidated constantly, because the need for more economic democracy and social justice that inspired the creation of CIRIEC is still very much present today. Although significant progress has been made in the fight against poverty since the Second World War, global disparities remain high and inequalities have even increased over the past two decades. As the United Nations website points out, the number of billionaires has more than doubled since the 2008 global financial crisis. Furthermore, the world's richest people (who account for just 1% of the world's population) captured 82% of the total wealth created in 2018²³⁷ and according to Oxfam's 2022 report, since the start of the coronavirus pandemic, the wealth of the world's ten richest individuals has doubled²³⁸. Globalisation has been accompanied everywhere by major challenges arising from technological and environmental transitions. More than ever, world peace and stability depend on the ability to move the current economic system towards greater equity in the distribution of the wealth created, in order to ensure sustainable development for all.

In recent years (and particularly in recent months) there have been encouraging signs that the doxa of 'capitalism against all odds' is being shaken. The coronavirus pandemic has once again demonstrated the role of public and social economy enterprises in providing essential services to the population and has prompted a rethink, even by ultra-liberal economists, of the austerity policies previously considered the only answers to economic crises. In June 2021, G7 Finance Ministers reached a 'historic' agreement on a global minimum tax. Increasingly, voices from a wide range of backgrounds (and well beyond the traditional left) are calling for a refocusing of the global economy on the public interest rather than the profit of a few.


237 Inequality – Bridging the Divide», United Nations website [consulted online: <https://www.un.org/fr/un75/inequality-bridging-divide/>].

238 Inequality kills, Oxfam information document, January 2022 [consulted online: [Rapport Oxfam Inegalites mondiales Davos 170122.pdf](https://www.oxfam.org/fr/document/inegalites-mondiales-davos-170122.pdf)].

236 Edgard Milhaud, *The International Centre For Research and Information on Collective Economy*, APCE, Jan-March 1948, Vol. 19., p. 29.



Supporting this discourse with elements of an analytical nature that allow for a better understanding of the mechanisms at play, highlighting the strengths (but sometimes also the pitfalls to be avoided) of the public, social and cooperative economy, putting people back at the centre of concern and creating 'collective value', even if this is not - as yet - easily measurable, would undoubtedly make it possible to keep up the momentum and thus hope to make a lasting dent in the neo-liberal credo. This is the mission that CIRIEC has been fulfilling since its creation, serving as a link between the scientific world, field managers and the political world. Today, the spectrum of people involved in (or interested in) the public, social and solidarity economy has widened. We are witnessing an increase in the number of alternative economy initiatives emanating from civil society, while the desire of citizens to actively participate in political decision-making and in the co-construction of public policies (through participatory democracy practices with ever wider scope) is becoming increasingly apparent. Opening up more widely and systematically to this new public could constitute an opportunity for CIRIEC in this context.



The abandonment of unbridled capitalism or, at the very least, its evolution towards a more supportive and sustainable form of economic system is perhaps no longer a complete utopia. Nevertheless, this change of paradigm will only succeed if a broad front of 'sceptics of ultra-capitalism' is formed to promote it, in the most coordinated way possible, both in public opinion and in political and of course economic circles. Thanks to the reliability of its analyses, its international network and the link it constitutes between scientists and various actors in the field, CIRIEC could play an important role in this coordination, which would, according to Milhaud's dream, create the conditions for helping «a more conscious mankind in becoming master of its destiny in an ever-increasing degree while at the same time securing the emancipation of the masses from all forms of exploitation and servitude in the full respect of the liberties and rights of the human being as well as peace²³⁹».

²³⁹ Edgard Milhaud, «The International Centre For Research and Information on Collective Economy», *op. cit.*, p. 27.





ANNEX. LIST OF CIRIEC PRESIDENTS AND DIRECTORS (1947-2022)

PRESIDENTS

1. Edgard Milhaud (1953-1960)
2. Maurice Delbouille (1960-1965)
3. Paul Lambert (1965-1977)
4. Joseph Stassart (1978-1980)
5. Anton Rauter (1980-1994)
6. Fritz Gautier (1994-1998)
7. Massimo Pinchera (1998-2000)
8. Jacques Fournier (2000-2002)
9. José Luis Monzón Campos (2002-2004)
10. Leona Detiège (2004-2008)
11. Wilhelm-Georg Hanss (2008-2012)
12. Léopold Beaulieu (2012-2014)
13. Alain Arnaud (2014-2018)
14. Jorge de Sá (2018-2019)
15. Alain Arnaud (2019-2022)

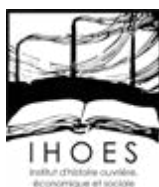
DIRECTORS

1. Edgard Milhaud (1947-1957)
2. Paul Lambert (1957-1977)
3. Guy Quaden (1978-1990)
4. Bernard Thiry (1990-2022)



CIRIEC
INTERNATIONAL

In 2022, CIRIEC (International Centre of Research and Information on the Public, Social and Cooperative Economy) celebrates its 75th anniversary. This is an opportunity for this international non-governmental scientific organization, founded in 1947 by Professor Edgard Milhaud, to take stock of its positioning with regard to the values that inspired its creation.



Edgard Milhaud
FONDATION • FOUNDATION