

# IMPORTANCE OF FINANCING THE SOCIAL ECONOMY PROJECTS

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**Abstract:** *The re-emergence of the social economy sector as important agent for occupation, economic growth, social solidarity, associationism and social services, coincided with a higher importance of running program and project-based activities in all European countries, irrespective whether they are member states of candidate states. Within the context of the benefits specific to the social economy projects it is important to debate and analyse the subject of continuing the activities of this form of economy by consolidating the financial allocations. Thus, complementary to the identification of new consistent sources of financing of the activity performed by the social economy organisations, it is important to know the position of the initiatives within the current context of the global economy and to apply rigorously the project implementation methodology.*

**Key-words:** *social economy, project, financial allocation, evaluation, project management*

## 1. Introduction

The social economy sector acquired a significant importance over the past 30 years, in terms of economic activity and social policies planning, both in the EU member

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states and worldwide, because of the increasing unemployment rates during the late 1970s and because of the lower assistance provided by the welfare state.

Within the context of the current economic crisis, negative consequences overlap and this reflects on the vulnerable groups: social tensions generated by the higher rate of poverty, the fear of unemployment, the higher number of families with serious financial problems, restrictions upon financing the credit for consumption and effects due to workforce mobility (Bostani I., Grosu V., 2010, p. 20). However, presently, social economy provides solutions to decrease social exclusion by increasing the employment rate of the vulnerable people and by establishing mechanisms in support of these people (Arpinte D., Cace S., Cojocaru Ş., 2010, p. 66).

At the European level, during the Lisbon Council of Europe (2000), the control of social exclusion was tackled by a coherent package of policies – social, occupational and economic – all of them highly interdependent (Lambro M., 2010, p. 165). In Romania, “within the academia, within the government and within the international organisations, a consistent level of expertise to measure poverty and social inclusion formed, accompanied by a solid history of using the indicators of poverty and social inclusion” (Briciu C., 2009, p. 165). When social economy interventions to control poverty are to be implemented, caution is recommended in choosing the working method, because “each of the poverty lines, irrespective of the method of calculation, include a large amount of subjectivism and relativity” (Pop, M.A., 2009, p. 394).

Running social economy projects gives the possibility to start lots of initiatives, because the expression itself comes from the combination of two terms which are often contradictory (Neamtan, 2002):

- „Economy” refers to the actual production of goods and services by a business or to an enterprise which contributes to a net increase of the collective wealth;
- „Social” refers to the social profitability, as expression which sometimes is opposed to the purely economic profit. Social profitability is evaluated in terms of contribution to the democratic development, encouraging an active and consolidated citizenship and of promoting the projects of individual and collective initiatives. Social profitability improves the quality of life and increases population’s welfare, particularly by making available more services. Social profitability can be evaluated in terms of job creation both in the public sector, and in the traditional private sector.

Planning, implementing and evaluating social economy initiatives based on project management relies on principles with universal value for most projects, irrespective of their size or complexity. This ensures the rigorous management of the projects by applying formal mechanisms and procedures which are important for the management of resources which the financiers quantify. Nowadays, it becomes acute

need to monitor and evaluate projects undertaken in this sector and to reveal the mechanisms which create a healthy ecosystem and vibrant economy that support these innovative and social entrepreneurs (Cace S., Arpinte D., Cace C., Cojocaru Ş., 2011, p. 65; Koutmalasou E., 2011; Katsikaris L., Parcharidis J., 2010, p. 90).

## **2. Establishment and development of the social economy initiatives – identification of the defining project elements**

The main forms of social economy appeared in the 19<sup>th</sup> century, but the associative expression of the people with socio-economic purposes started in ancient times. However, it is difficult to state that the genesis of social economy identifies largely with the gradual historical establishment of the different forms of human association.

The emergence of social economy followed the acknowledgement of the right to free association in some European countries (Ministerul Muncii, Familiei și Protecției Sociale (2011), aspect shown below in terms of chronology of the development of different social economy initiatives.

### **Box 1**

#### **Establishment of the social economy structures in the United Kingdom, Germany, Spain and France**

##### **United Kingdom**

- Influence of the socialist current: William Thompson, George Mudie, William King, Thomas Hodgskin, John Gray, John Bray
- 1824-1835 – the associated labour unions joined the socialist movement within the context of emancipation of the working classes
- 1831-1835 – 8 cooperative congresses coordinated both the cooperatives and the labour unions activity; establishment of the *Grand National Consolidated Trade Union* during one of the congresses, which unified all British unions
- 1844 – William King established the cooperative *Rochdale*, with 28 workers; the principles of Rochdale cooperative have been adopted by all types of cooperatives
- 1895 – establishment of the *International Co-operative Alliance* (ICA) in London

##### **Germany**

- Promoters of the movement to associate the industrial workers: Ludwing Gall, Friedrich Harkort, Stephan Born
- Pioneers of cooperatives; urban areas – Victor Aimé Huber and Schulze-Delitzsch, rural areas – Friedrich Wilhelm Raiffeisen (in 1862 he established the first credit union at Anhausen and in 1877 he established *the German Federation of the Raiffeisen-type Rural Cooperatives*)

- 1876 – adoption of special legislation on the rural mutualism and on the worker mutual assistance societies

#### **Spain**

- 1840 – the weavers from Barcelona established their first labour union *Asociación de Tejedores*, concomitantly with the provident-type mutual society, *Asociación Mutua de Tejedores*, which became in 1842 *Compañía Fabril de Tejedores*

#### **Italy**

- During the first third of the 19<sup>th</sup> century there have been many mutual societies of assistance, which preceded the first cooperatives
- 1853 – the society of mutual assistance *Società operaia di Torino* led to the establishment of the first consumer cooperative – *Magazzino di Provvidenza di Torino*, in order to defend the purchasing power of its employed members

#### **France**

- Influence of the socialist current: Claude-Henri de Saint Simon, Charles Fourier, Louis Blanc
- 1834 – first important cooperative of the workers was established in Paris – *Association Chretienne des Bijoutiers en Doré* – by Jean-Phillippe Buchez, disciple of Saint-Simon
- 1847 – the workers associations were behind 2,500 societies of mutual assistance, with 400,000 members and 1.6 million beneficiaries

*Source: CIRIEC, 2007, p. 11-13.*

The term of social economy has multiple meanings that can be analysed starting from the crystallization of the first initiatives in this field. Thus, the term appeared simultaneously both within the establishment of a social science, and to designate a group of practices and institutions (Demoustier, 2004):

A. As concept, social economy was launched in the 19<sup>th</sup> century, and experienced several adaptations:

- Either as consolidation of the political economy – production of means of existence beyond the material production, by liberals (such as Charles Dunoyer in 1830, which provided the starting support for another author in 1848 – John Stuart Mill),
- Or as critique and substitute of the political economy (by Christians and socialists, such as Auguste Ott in 1851),
- Or as a form of integrating the political economy (Prodhon)

- Or as a complement to some economic currents within which the public economies were growing (Walras 1896, Gide 1905).

B. As assembly of practices and institutions, social economy freed progressively from the theories developed by the economists, then by the organisations of company owners, only to be defined gradually in terms of economic association. Thus, the rediscovery of the social economy in the 20<sup>th</sup> century was marked by the increased autonomy of the collective private organisations in relation with their integration within the public interventions, as particular forms of the non-capitalist companies, in opposition with the mistrust and selectivity imposed by competition and by conditioned financing.

The ambivalent relations between the social science and practice denote the importance given to the innovation and reciprocal influencing of the two spheres; this highlights the importance of the initiatives, in general, and of the projects, in particular, to open new horizons of knowledge.

Within this incipient framework of social economy establishment, one may easily observe that there is no specific framework for the implementation of projects, as they are known from the current specific and diverse terminology. In order to have idea on the significance of projects we will cite the definition given by the Foundation for the Development of the Civil Society – Centre for Non-governmental Organisations Development (FDSC, 1998):

<b>Box 2</b>
<b>Definition of the project</b>
<ul style="list-style-type: none"> <li>• Anticipative thinking directed towards the purpose to make a change, perceived as favourable by the one intending to make the change</li> <li>• Technical and financial documentation, rigorously composed, used to develop a particular system with predetermined characteristics and performance, and with limited risks.</li> <li>• Activity with a start and an end, planned and controlled, conducted with the purpose to make a change.</li> </ul>

From this point of view, this pioneering stage (1830-1945), of theoretical genesis and testing of the social economy practices, is specific to socio-economic initiatives and innovating activities. Thus, in order to avoid starting social economy activities which are not backed by project management, we need to know comparatively the characteristics of the activities and of the projects:

Table 1  
*Projects versus current activities*

<b>Projects</b>	<b>Current activities</b>
<ul style="list-style-type: none"> <li>• Involve significant changes</li> <li>• Limited as extent and duration</li> <li>• Unique</li> <li>• Use temporary resources</li> <li>• Are temporary</li> <li>• Management directed towards accomplishing project objectives</li> <li>• Characterised by risk and incertitude</li> </ul>	<ul style="list-style-type: none"> <li>• The possible changes are small and gradual</li> <li>• Never end</li> <li>• Have a repetitive character</li> <li>• Use stable resources</li> <li>• Are permanent</li> <li>• Management directed towards accomplishing a role</li> <li>• Characterised by a feeling of stability</li> </ul>

Source: Bărgăoanu, 2004.

Within the context of comparing the stage of social economy emergence with the current stage fundamented in project management, the six major differences between activities and projects reveal their validity:

- The project has a clearly defined start and end: going through a project from the beginning to the end implies a properly defined sequence of steps or activities;
- The projects use resources (human, time and money) specially allocated for the accomplishment of the project activities;
- Each project produces unique outcomes. These results have specific objectives of quality and performance. When the project finished, something new has been created, something that didn't exist before;
- The projects unfold according to a plan; they are organised so as to achieve the set objectives;
- A project usually involves a team which to accomplish the project;
- The projects always have a unique set of stakeholders that includes: the project team, the clients, the project manager; the executive managers; governmental representatives; other people interested by the project. The stakeholders always have different expectations on the outcomes;

Unlike other types of management, the project focuses entirely on a final result, and when this result is obtained, the project ceases to be necessary and it is therefore discontinued (Newton, 2006). The first crystallizations of the social economy forms didn't aim to achieve specific final results; the absence of the project terminology was obvious and it made inoperable initiatives of elaboration, implementation and evaluation of projects.

### 3. Current characteristics of the social economy projects

The social economy initiatives based on project management are clearly relying on principles that are of universal value for most projects, irrespective of their size or complexity. Thus, the rigorous administration of the projects is ensured by the application of formal mechanisms and procedures which are important for the administration of resources which the financiers quantify.

Table 2  
*Principles of project management*

Principle of commitment	It is applied between the financier (sponsor, supplier of resources, financing agency) and the institution/organisation aiming to run a project. Before the start of any activity there has to be an equitable engagement. This engagement means that both sides involved know very well what effort must be deployed in order to accomplish the project; that they know, at least in general, the processes and risks associated to the project, that they are willing to share and assume responsibility for the risks and for a possible failure.
Principle of the predefined success	The underlying norms which make a project to be considered successful, both in terms of running, and in terms of the outcome, must be defined from the very beginning, before any activity starts. Thus, the agreed success criteria may be the basis for the decision-making process and for the final evaluation. Thus, there are two types of criteria of success describing the progress of a project. The first one refers to the observation of the time limits, of the budget, to the efficient utilization of any other type of resources (human, equipment, locations) and to the perception developed around the project. The second one refers to the outcome of the project and consider the quality, technical standards, relevance of the project, its efficiency, field of action, as well as to the perception developing around the end product/outcome.
Principle of efficiency/internal consistency/interdependence	This is the relation of interdependence existing between the scope of the project, the allocated time, the budget and the projected quality of the end product. The four elements are interrelated; they must be achievable and reflect each other. Any change in one of these elements leads to changes in the other elements. The change of the project scope causes changes in the quality, time and resources required by the project.
Principle of strategy	Any project must have an underlying strategy. Within the field of social economy, planning always precedes execution. In plain words, this principle sets what has to be done and when.

Principle of control	All projects must be governed by rigorous and efficient policies and procedures of control and monitoring. Unlike the previous principle, this principle sets how a particular thing must be done and by whom.
Principle of the single communication channel	Between the financier and the project manager there has to be a single channel through which the vital important decisions for the project are communicated. This principle doesn't exclude the principle of transparency or the principle of the unimpeded access to information. It is important that within the process of decision-making and of communicating the decisions within the framework of the project, both the financier and the promoter of the project, communicate via a single representative. Otherwise, the decisions will get erroneously to the executive unit, they become contradictory; this affects the proper execution of the project.
Principle of the stimulating working environment	The duty of the project manager is to create, for the team members, a stimulating working environment, which to enable the expression of their full potential. This environment can be achieved both by adopting a style of management adequate to the particular project, and by the smart administration of the relation with the whole organisation. The project manager must be concerned not to isolate the team he/she is leading from the rest of the organisation, that the project he/she is directing is known, accepted and appreciated within the organisation.

Source: Florescu M., Marton B., Neamtu B., Balogh N., *Project management. Sustainable development: course lecture*, pp. 26-27, [http://www.apubb.ro/wp-content/uploads/2011/03/Managementu\\_-\\_proiectelor\\_Dezvoltare\\_durabila.pdf](http://www.apubb.ro/wp-content/uploads/2011/03/Managementu_-_proiectelor_Dezvoltare_durabila.pdf)

The first step of the interventions in the field of social economy in order to apply the principles of the project management refers to the knowledge of the main mechanisms which operate in this field (as seen in the table below).

**Table 3**  
*Main mechanisms operating within the social economy*

	<b>Non-governmental organisations</b>	<b>Mutual associations</b>	<b>Cooperatives</b>
<b>Role</b>	Supply of services to its members and/or to the entire community	Supply of services to its members and their families	Supply of goods and services to its members and, in certain circumstances, to the community



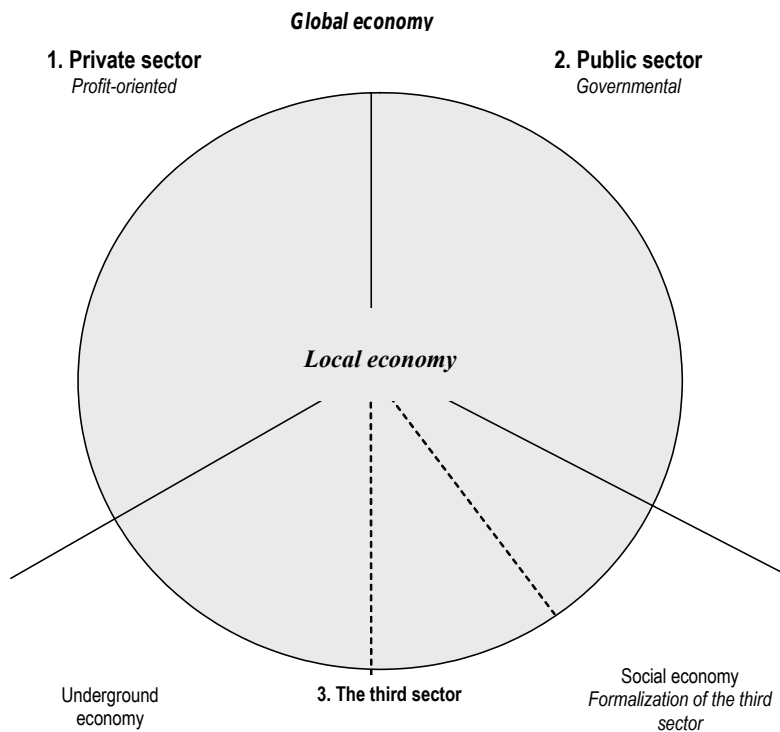
	<b>Non-governmental organisations</b>	<b>Mutual associations</b>	<b>Cooperatives</b>
<b>Types of products and benefits</b>	Goods and services that generally are not on the market, but with increasing demand. Depending on the methods of implementation, which are quite variable, both the members and the community may enjoy the benefit of these goods and services	Services which essentially are not on the market. The benefit of its members depends on their needs.	Goods and services available on the market too. Each member has benefits depending on the number of transactions achieved within the cooperative
<b>Membership</b>	Individuals or entities, privately	Just private individuals	Individuals or entities, privately
<b>Power division</b>	The "one man one vote" principle is applied within the general assembly	The "one man one vote" principle is applied within the general meetings of the members	The "one man one vote" principle is applied within the general meetings of the members
<b>Financing</b>	Membership fees and/or donations. When the members withdraw/resign, their membership fees are not reimbursed	Membership fees paid at regular intervals. When the members withdraw/resign, their membership fees are not reimbursed	Subscriptions for shares and/or contributions are regular intervals. When the members withdraw/resign, they are reimbursed
<b>Distribution of the surplus</b>	Never distributed to the members The surplus must be invested in an activity of social utility	Never distributed to the members May be used as backup fund and/or to decrease the membership fees and/or increase benefits	Partially distributed to the members May be used as backup fund to improve the services or to develop further the activity of the cooperative

Source: Defourny J., Develtere P., „The Social Economy: the worldwide making of a third sector”, in Defourny J., Develtere P., Fonteneau B. (eds.) (1999), *L'Economie sociale au Nord et au Sud*, De Boeck, Bruxelles

Generally speaking, there are three main sources of income available to the social economy organisations (Hatzimiceva, Katerina, p. 5-8):

1. **Profit generating activities:** fees for the supplied services, sales, membership fees, renting, investments, business (forming 53% of the income);
2. **Governmental financing** (central and local) (forming 35% of the income);
3. **Philanthropy** (financial donations and in kind support from volunteers) (forming 12% of the income).

Figure 1  
*Location of the social economy*



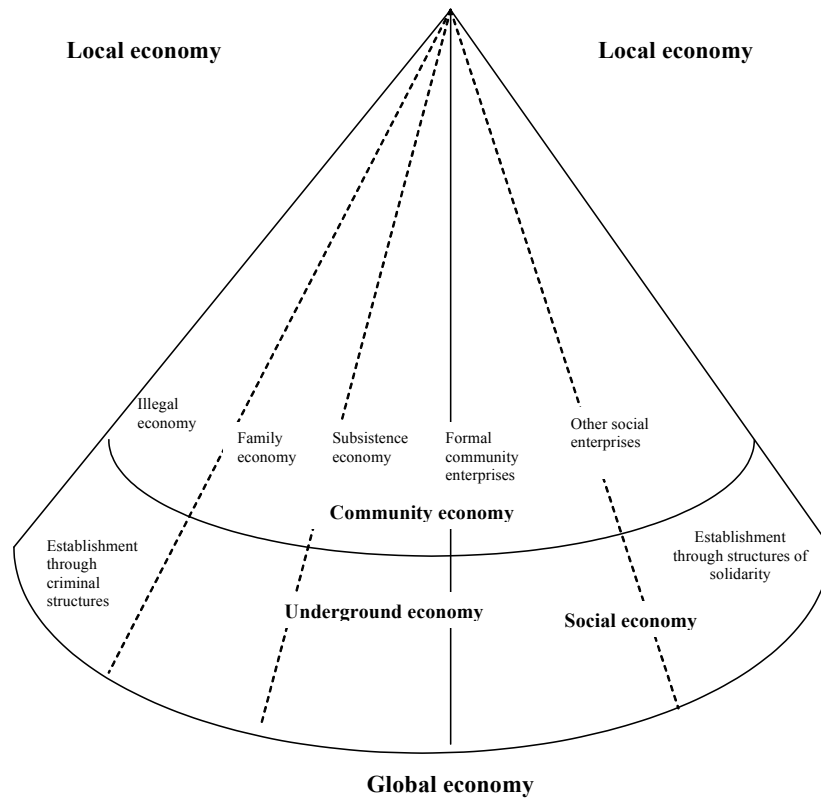
Source: Evans, M., *The Social Economy and the Shadowy Side of the life Course*, Horizons, vol. 8, No. 2, February 2006, Government of Canada, Ottawa, p. 49

The relative importance of these three sources varies with the country and region, and no independent approach may improve the problem of sustainability. Each country must

evaluate which is the strategic priority depending on the local circumstance. The provision of diversified sources of financing is important for the viability and development of the different types of organisations. However, some sources are more important than other, just like at the global level, where the social economy organisations active in the field of health and social services take most of the governmental financing.

Irrespective of the source of financing the activity of the social economy organisations, the project implementation methodology applies; it is of utmost importance to know the location of this form of economy within the current context of the global economy.

**Figure 2**  
*Social economy and underground economy*



Source: Evans, M. (2006), The Social Economy and the Shadowy Side of the life Course, Horizons, vol. 8, No. 2, February 2006, Government of Canada, Ottawa, p. 50

As it may be seen in the figure 2, the location of the social economy under the extended umbrella of the community economy, next to different forms of the underground economy, clarifies, by comparison, the need to approach this field in a structured and formalised manner. Thus, project management is the determinant and main characteristic of the social economy activity.

The first analysis of a social economy project involves placing it within the general typology of the projects, the most used classification including 3 characteristics (scope, area of activity and size) (Scarlat&Galoiu, 2002):

**1. By their scope:**

- Organizational;
- Local (locality, county, group of counties);
- National;
- Regional (the project is of interest for several counties from a particular geographical area);
- International.

**2. By the field of the project objective and activities:**

- Industrial projects;
- Social projects;
- Commercial projects;
- Cultural projects;
- Environmental protection projects;
- scientific projects (research);
- Educational projects;
- Management projects.

**3. By their size:**

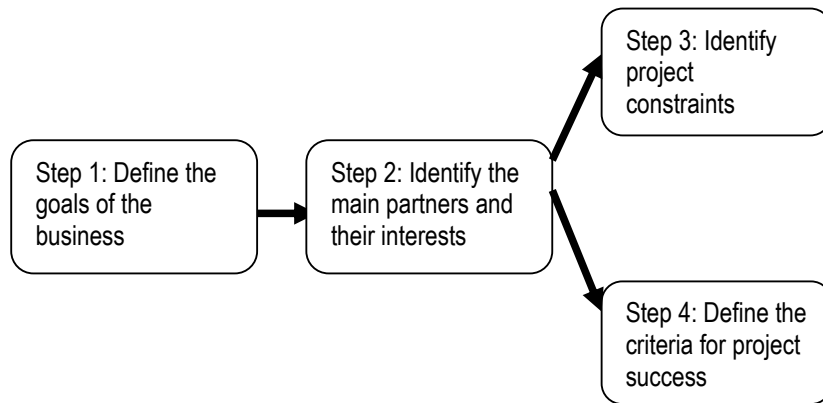
- Small projects: this type of projects has a duration of no longer than one year; low values; allow part-time employment; have modest technological requirements and allow the direct daily monitoring;
- Medium projects: their duration extends from two to three years; they have medium values; allow both part-time and full-time employment; have medium technological requirements and are monitored by periodical reports;

- Large projects: they have long terms, more than three to five years; have high value; allow only full-time employment; have high-tech requirements; use specific instruments and software; they are monitored through inspection reports.

The current financial limitations brought into discussion the need to measure the success of a project so that on the basis of evidences quantified by methodologies previously validated in practice, the project outcomes can be evaluated with the purpose to continue financing or the multiply the action within other initiatives.

Four subsequent defining factors can be taken into consideration in order to know where the project is heading:

Figure 3  
Process of defining the criteria for success



Social economy activities (economic or social activity) are characterized by three main elements (inputs, process(es) and outputs); the context of project implementation must be shown both individually and in combination:

- **Inputs** – They can be: financial resources, work (paid and unpaid), knowledge/research, capacity building, learning possibilities, state policies, state legislation, infrastructure, community organisation etc.
- **Process(es)** – Two important criteria for process evaluation are efficiency and efficacy. They may include: how the work is done, including the values they embody and the relations they strengthen; such as administrative practices, partnerships, participation in decision-making (for instance, the democratic processes), human capital development, results (services, products, etc.), innovation, etc.

- **Outputs** – The two main criteria for evaluation that are usually very important are the impact and the sustainability. Within the context of the social economy, there are two major results that we may want to measure, the economic and the social one. However, there also are other important, non socio-economic results, such as sector development.

Examples of quantification of the social economy results are given in the paper of Greek authors *Functions planning and technical requirements of the active social economy observer in Greece* (Greek Ministry of Employment and Social Protection, EQUAL Program, 2006, p. 49-51).

Table 4  
*Quantification of social economy activities*

Types of indicators	Measuring
A) General indicators	<ul style="list-style-type: none"> <li>• Proportion of the different types of social economy companies, compared to the total number of social economy companies</li> <li>• Proportion of the social economy companies by type of activity (national/regional/local, etc.)</li> <li>• Other</li> </ul>
B) Economic indicators	<ul style="list-style-type: none"> <li>• Average income</li> <li>• Average expenditure of the social economy companies by type of company and geographical location</li> <li>• Proportion of turnover financing of the social economy companies by type of company and geographical location</li> </ul>
C) Occupational indicators	<ul style="list-style-type: none"> <li>• Average proportion of the staff employed by the social economy companies by type of company and geographical location</li> <li>• Average proportion of job creation by the social economy companies by type of company and geographical location</li> <li>• Other</li> </ul>
D) Visibility / promotion indicator	<ul style="list-style-type: none"> <li>• Proportion of visibility/promotion of the products/services of the social economy companies active on the market</li> </ul>
E) Innovation indicator	<ul style="list-style-type: none"> <li>• Proportion of social economy companies which introduced, during the past 3 years of activity, innovative activities for their products/services, by type of company</li> </ul>
F) Indicator for collaborating organisations/authorities	<ul style="list-style-type: none"> <li>• Proportion of social economy companies which established cooperation relations with the EU/public authorities/other social economy companies, by type of company and geographical location</li> </ul>

Social economy development is at a crucial stage due to the present economic crisis which will validate or invalidate specific economic patterns; the process of social economy projects evaluation and monitoring is a priority because it allows demonstrating the need to continue the innovating initiatives that may change people and communities.

Within the context in which major stress is out in the implementation of Europe 2020 strategy, which is associated to the definition of the social economy as a serious partner of the civil society and of the state (Zamfir E., Fitzek S. 2010, p. 8), it is absolutely necessary to monitor and evaluate the social economy initiatives and to display the mechanisms that establish a healthy and vibrant ecosystem through this form of economy which supports the innovating social entrepreneurs (Cace S., Arpinte D., Cace C., Cojocaru Ş., 2011, p. 65).

### **Conclusions**

The re-emergence of the social economy sector as important agent for occupation, economic growth, social solidarity, associationism and social services, coincided with a higher importance of running program and project-based activities in all European countries, irrespective whether they are member states of candidate states

The social stake of the European Union to consolidate the welfare of its member states is particularly active by the promotion of social economy projects; there is a rather comprehensive range of programs that can be accessed by the social economy organisations by the elaboration and implementation of projects. The structural funds and the Fund of Cohesion are financial instruments of the policy of economic and social cohesion. These instruments help narrowing the gap between the development levels of the different regions of the EU member states, thus promoting the economic and social cohesion. The general rules for the structural funds and for the cohesion fund were set by the *Regulation of the Council of the European Union 1083/2006 from July 2006*, which defines the general framework for the European Regional Development Fund, the European Social Fund and the Fund of Cohesion.

The proposal from the regulation regarding ESF<sup>1</sup> for the period 2014-2020 includes a budget envelope of 376 billion Euros, while for the concentration of financing in agreement with the accomplishment of a sufficient and demonstrable impact, it includes the following provisions: the support for the administrative capacity should be limited to the member states with less developed regions or with regions eligible for the Cohesion Fund; at least 20% of the amounts allocated through ESF should be used to promote social inclusion and to control poverty; within the operational

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<sup>1</sup> COM(2011) 607 final, Bruxelles, 6.10.2011, 2011/0268 (COD).

programs, financing should concentrate on a limited number of investment priorities. Also, in agreement with the draft regulation for ESF 2014-2020, four thematic objectives are targeted: promote labour force employment and worker mobility; investments in education, building competencies and life-long learning; promotion of social inclusion and control poverty; consolidate the institutional capacity and the efficiency of the public administration.

Complementary to the identification of new consistent sources of financing of the activity performed by the social economy organisations, it is important to know the position of the initiatives within the current context of the global economy and to apply rigorously the project implementation methodology.

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