

Social Entrepreneurship: an Instrument of Social and Development Policy

Scientific article

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ABSTRACT - In recent decades, the global economy was expected to strongly contribute to the economic development of countries and the welfare of their citizens. However, if we observe the state of the economy of countries in the world and the standard of the citizens, it is obvious that the global economy has entered into the crisis. The last global crisis has shown that social enterprises proved to be more resilient than conventional companies, in this period they had less redundancies from employment and in some sectors they even increased the number of employees. This paper presents the models of social entrepreneurship in the selected countries of the EU, their potential and importance for marginalised categories. The analysis showed that social entrepreneurship is a powerful lever of social and development policies. From the economic, social and psychological point of view, the inclusion of socially excluded groups through various forms of social entrepreneurship makes a significant contribution, both to individuals and to the society.

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KLJČNE BESEDE: socialna ekonomija, socialno podjetništvo, socialno podjetje

POVZETEK - V zadnjih desetletjih se je od globalne ekonomije pričakovalo, da bo močno prispevala h gospodarskemu razvoju držav in blaginji njenih državljanov. Toda, če pogledamo stanje gospodarstva držav v svetu in standard njihovih državljanov, je jasno, da je svetovno gospodarstvo v krizi. Zadnja globalna kriza je pokazala, da so socialna podjetja odpornejša od konvencionalnih, v tem obdobju so manj odpuščala in v nekaterih sektorjih celo povečevala število zaposlenih. V članku predstavljamo modele socialnega podjetništva v izbranih državah EU, njihov potencial in pomen za marginalizirane skupine. Analiza je pokazala, da je socialno podjetništvo močan vzvod socialnih in razvojnih politik. Z ekonomskega, socialnega in psihološkega vidika predstavlja vključevanje socialno izključenih skupin na trg dela preko različnih oblik socialnega podjetništva pomemben prispevek tako za posameznika kot za družbo.

1 Introduction

In recent decades, the global economy presented as the story of the great economic success and prosperity, as a new project that will bring benefit to all. However, an unprecedented race for profits began to take its toll. The neoliberal economy, whose basic principles are profit and consumption, has shown its weakness and unsustainability. The complex economic, social, social, cultural, environmental problems are on the scene and they have consequences for the political and socio-economic crisis in many countries, especially underdeveloped. The deep financial crisis has revealed the gap between the business practice and moral values.

In the year 2000, according to the research of the World Institute for Development Economics Research (UNU-WIDER, 2016) - the first research and training centre of United Nations University, based in Helsinki, Finland in 1984, 94% of the world's income is distributed to 40% of the population of the Earth, while to the remaining

60% comes just 6% of world income. According to the estimations by the World Bank (2016), nearly half of the world's population lives on less than \$2 a day, more than a billion of them are undernourished, 2.5 billion have no basic hygiene. The data from the last years demonstrate the increasing stratification in developed countries, and the increasing proportion of the population falling into poverty as well. Key directions of economic - technological development, with the help of the government, determine the multinational companies. Some of them, with their global scope of operations exceed the GDP of developing countries by several times (e.g. capital of Wal-Mart is larger than the GDP of Turkey or Denmark; three hundred largest multinational companies own more than a quarter of the world's capital).

In conditions of growing social needs, the current policy of social welfare of the unemployed has proved too expensive and ineffective. The new conditions and relations are demanding innovation in terms of employment and social welfare. There is a need for all available resources to be used as generators of employment, in other words, a need for new social values of the society. It is necessary to motivate and empower individuals to become active agents of social changes. One of the effective models of social inclusion is the social entrepreneurship which is a significant component of the social economy. It represents a powerful tool for solving problems of economic dependence of marginalised, socially vulnerable groups, as well as problems in local communities.

The world economic crisis of 2008 showed that social entrepreneurship is an important factor in the stabilisation of the labour market. In fact, social enterprises have proved to be less vulnerable during the global economic crisis. Thus, for example, in Italy, where the crisis drastically reduced the number of employees, the number of cooperatives increased by 2.7%, which shows that they are a factor of sustainable community development (Roelants et al., 2012). Direct impact of the work of social enterprises has been recognised in the economic development of a community or region by (Petričević, 2012):

- complementing the services of public interest with their activities;
- contributing to the balanced use and allocation of available resources for the benefit of local community;
- generating new jobs in their areas of responsibility, and some social enterprises are particularly focused on integration of long-term unemployed into the labour market;
- encouraging social cohesion and contribute to the growth and development of social capital;
- supporting the institutionalisation of informal entrepreneurial activities of the private for-profit sector, etc.

Social entrepreneurship represents an innovative model in the approach to social protection, which is caused, on the one hand, by the growth of social needs in European countries, and on the other hand, by the inability of the state itself to have quality solution for the growing needs. Borzaga et al. (2008) states that failure to provide the former level of social security of old-age pensions, free health care and other servi-

ces, has resulted in unemployment and reduction in the scope of services of general interest, especially for those who cannot provide their own services. This has led to the new lines of action of citizens' associations and foundations, and to the addressing economic activities of general public importance. According to Cvejić et al. (2008, p. 18), social enterprises generate multiple effects. They carry out work integration of hard-to-employ categories, social inclusion of vulnerable groups, and reduce government expenditure.

2 Methods

The paper is built on the analysis and synthesis of the available literature, previous research and studies, information provided through the Internet, and expert interviews. The knowledge of the area and the laws in each country enable us to describe the phenomenon of social entrepreneurship and creation of social entrepreneurship initiatives in selected countries. The purpose of this paper is to present the models of social entrepreneurship in the selected countries of the EU, their potential and importance for marginalised categories.

3 The concept of social entrepreneurship

Social entrepreneurship is the practice of combining innovation, resourcefulness and opportunity to critical social and environmental challenges. Social enterprises operate through the market to produce social, financial and environmental benefits. Their focus are social groups that are excluded from the market competition. Profit maximisation is not the main objective to social entrepreneurship, nor is the distribution of profit; it is the fulfilment of social objectives, that is, helping those categories in society who are at risk of social exclusion. Entrepreneurial activities are based on solidarity and social justice. The origins of the social enterprise movement of today that started with Drayton, Yunus, and others (e.g. Waddock and James who first used the term social entrepreneurship in their article in 1991) imply that social enterprise is an applied science concerned with serving the public good.

The essence of social entrepreneurship is a simultaneous action to create public good by detecting and identifying social problems, as well as using entrepreneurial principles to attain positive social changes. In fact, social entrepreneurship is a social innovation, because social enterprises demonstrate how successful the combination of business with social and environmental topics can be (Konda et al., 2015, p. 213). Yunus (2009) believes that there are new and fascinating opportunities for implementing social enterprises in the market, and the market is becoming increasingly interesting, attractive and competitive. Rather than focusing on generating profit, social enterprises aim at a good cause, in this way acting as a vector of change. They provide products, services, customers, markets, inflows and outflows; however, their

underlying guideline is social usefulness. Yunus provides an alternative option – companies geared towards maximizing profit, but run by poor people.

Social entrepreneurship is part of the social economy. It involves the application of the principles of social responsibility – to the greatest extent in comparison with companies that also practice social responsibility, at least in some aspects. The social economy is a sector that contributes significantly to employment, sustainable growth and more equitable distribution of wealth.

3.1 Social entrepreneurship in the EU

The most important policy framework of the EU is Europe 2020, growth strategy of the EU in the medium term. The strategy highlights three priorities relating to (European Commission, 2011, p. 5): (1) smart growth - developing an economy based on knowledge and innovations; (2) sustainable development - promoting a more competitive economy that makes efficient use of resources and takes into account the environment; (3) inclusive growth - fostering a high-employment economy delivering social and territorial cohesion.

In October 2011, an initiative was launched for social entrepreneurship aiming to encourage corporate social responsibility, to facilitate social entrepreneurship and reduce bureaucracy for small and medium-sized entrepreneurship. The main components of the action plan in which social entrepreneurship should support the development of social enterprises are:

- improving access to finance through
 - facilitating access to private funding;
 - mobilisation of the EU funds;
- increasing the visibility of social entrepreneurship by
 - developing tools for better understanding of the sector and increasing the visibility of social entrepreneurship;
 - strengthening management skills, professionalism and networking of social business;
- improving the legal environment by
 - developing appropriate European legal forms which could be used in the European social entrepreneurship;
 - public Procurements;
 - state supports.

Chell et al. (2010, p. 486) argue that even in Europe there is some variation in the social entrepreneurship elaboration. There are three factors to explain country variations in Europe (Borzaga and Defourny (2001): (1) the level of development of the economic and social systems; (2) the characteristics of the welfare systems and of the traditional third sector, and (3) the nature of the underpinning legal systems. Therefore, it is likely that in each country with different influencing factors there are also variations in social entrepreneurship situation: drivers, opportunities, challenges and different trajectories and success stories of social entrepreneurship initiatives development.

3.2 Italy

In Italy, since 1999, the institutional framework for social enterprises has been created by law in the form of cooperative, while in 2006 a new law that regulates social enterprises was passed. More specifically, in the Law 381/1991 and decree No. 155/2006 lay down the general legal framework for social enterprises (*impresa sociale*). Law 68/99 regulates the employment of persons with disabilities in profit, public and non-profit organisations. While the Law 328/00 regulates basic social expertise of subcontractors that are required to operate in the area of health care, social services and other public services, the Law 327/00 regulates the evaluation of services delivery, safety at work and working conditions to protect health in the workplace (Luzar, 2005, p. 15). In 2006, the first formal definition of social enterprises was presented in Italy and their work was regulated.

The term “social enterprises” is like a legal “brand”, available to all organisations under equal conditions (art. 1, para. 1, and art. 7 of the Law 155/2006). A social enterprise is required to operate as a private organisation; to perform entrepreneurial activities of production of social utility goods and services; to represent the general interest, and not to operate for profit.

Social enterprise must be based on the following principles: proper and efficient management; transparency; non-discrimination; participation; protection of workers.

In 1991, the Law of voluntary organisations (266/91) was adopted, which provided the rules on registration of volunteers’ organisations. Volunteers are not entitled to remuneration for their work, but are entitled to reimbursement of costs and have health insurance in case of injuries. Number of volunteers cannot be greater than 50% of the total number of members of the organisation. They have the right to vocational training under the same conditions as the members of the organisation.

In 2011, 365 social enterprises were registered in the trading companies register, and an additional 404 had the prefix “social enterprise” in the name of the company, although they were not listed in the Register, while 11 were registered, 808 social cooperatives (IRIS, Social Enterprise in Italy). Tax reductions have only those organisations that operate in the public interest. These benefits do not apply to companies that have the status of a social enterprise, because companies cannot get the status of an organisation that operates in the public interest. For this reason, more questions are raised:

- given that there are no benefits for social enterprises, which are registered as commercial companies, the question of the motive for this kind of registration appears;
- why the Act on social enterprises is not fully harmonised with the Law of organisations that operate in the public interest. Namely, this Law does not recognise the professional and technical support for social enterprises that operate in the public interest.

In Italy, social cooperatives are particularly proven as a successful model of social entrepreneurship. According to the Law of social cooperatives, adopted in 1991,

social cooperatives (cooperative sociali) are established in order to meet the overall objectives of the community, as well as the social inclusion of marginalised groups. They combine the classic features of cooperatives and social enterprises. Social cooperatives are engaged in activities of social services (social and health care, educational services, help and care at home, accommodation of vulnerable categories, preserving and caring for children, cultural activities and environmental protection), including training activities (activation of people who are marginalised in society and who cannot engage in business and employment activities) (Thomas, 2004, p. 244). Social cooperatives operate as the “type A” or “type B” social cooperatives. The type A social cooperatives deliver and provide social, health or educational services. The type B social cooperatives provide work integration of disadvantaged people, and any economic activity which helps to the integration of especially vulnerable groups, in addition to economic activities in the area of social protection, health and education (Defourny and Nyssens, 2008). Most social cooperatives in Italy (80%) belong to the type A (Article 1, Paragraph 1, Letter A, Law 381/1991) and operate on the market as other actors, for instance commercial companies, while the cooperatives of type B are organised as organisations for employment of vulnerable groups. According to the law, at least 30% of employees in the type B cooperatives must belong to particularly vulnerable groups (people with physical or mental disabilities, blind persons or persons with visual impairments, persons discharged from psychiatric institutions, or treated for mental illness or addiction, as well as persons sentenced to an alternative penalty of law, instead of serving the sentence in prison).

A social cooperative can be established by at least three natural or legal persons. The founders of the cooperative, who are natural persons of cooperative can be employees, board members, volunteers and users of the services of the cooperative. Natural members’ volunteers may not constitute more than 50% of total employees. Social cooperatives operate in accordance with the universal cooperative principles, which include voluntarism and open membership, solidarity, democratic way of decision-making, economic participation of members, autonomy and independence of their members, the right to information, education and training of members, partnership between cooperatives and concern for society. The founders of social cooperatives may also be other social cooperatives, civic associations, foundations, trading companies), as well as public legal entities. In practice, it often happens that the founders of the cooperative are municipalities as public-legal entities.

The law does not prescribe minimum amount of the initial capital. The statute of the cooperative closely regulates these issues. For the basic purpose, type B social cooperatives promote the concept of participation of beneficiaries. Social cooperatives must allocate a minimum of 30% of the profit on annual basis to the compulsory reserve fund. Similarly, a social cooperative has the obligation to set aside 3% of the realised annual profit in a mutual fund managed by an umbrella organisation of social cooperatives at the state level. The remaining annual profit may be distributed among the members of the cooperative in accordance with its statute. The law allows for the transformation of the cooperative into a trading company. At the same time, the social

cooperative must meet all the legal requirements for the establishment of a form of the commercial company, including a minimum amount of the initial capital.

In case of termination of work of the social cooperative, the remaining assets are to be used for multi-beneficial uses and cannot be shared between members in any case.

The law prescribes special tax reliefs for social cooperatives. No VAT shall be paid on the funds that the cooperative allocated in the compulsory fund. A reduced rate of VAT, which amounts to 4% (if the social cooperative decides to register in the VAT system) is being paid for the services that the cooperative offers. Also, social cooperatives have privileged status in the public procurement system.

According to Fici (2006, p. 9), an essential weakness of the Italian Law of social entrepreneurship is that it does not enforce the principle of democracy in the sense "one head, one vote" which is, however, explicitly recognised by the Slovenian ZSocP (i.e. Social Entrepreneurship Act). He says that this shortcoming should not surprise us, because the law does not limit eligible organisations on the basis of their legal form (cooperative, investor-owned firm or traditional non-profit firm), as long as it complies with all other provisions of the social entrepreneurship.

3.3 Slovenia

Social entrepreneurship in Slovenia has still not reached a satisfactory level, primarily because the poor knowledge and lack of understanding of the concept of social entrepreneurship, its principles, goals and benefits. According to the classification of the EU, Slovenia belongs to the group of countries where the concept of social economy is not widely known and accepted (Monzón and Chaves, 2012, p. 28). Social economy sector in Slovenia employs a meagre 0.74% of the workforce (Černak-Meglič and Rakar, 2009, p. 241), in contrast to the EU where social economy enterprises make up 3 million organisations or 10% of all European companies, employing 6.5% of the total working population of the EU-27 (European Commission, 2013, p. 45). Therefore, the potential of social entrepreneurship in Slovenia is unexploited. The cooperation between the institutions responsible for the development of social entrepreneurship at national and regional level is still insufficient, and there is a lack of mechanisms for financial investments in social enterprises.

In early March 2011, the National Assembly adopted ZSocP (Social Entrepreneurship Act), which entered into force on 2 April 2011, and started being applied on 1 January 2012. The Social Entrepreneurship Act in Slovenia envisages an open system of entrepreneurship: type A and type B. Status of the type A social enterprise, according to Article 8 of the ZSocP, may be established by non-profit legal entity, if it is constantly active in the field of social entrepreneurship, and employs at least one employee in the first year and at least two employees in the forthcoming years. The third paragraph of Article 8 of ZSocP foresees to maintain the status of the type A social enterprise after the end of the second calendar year, and that the activities of social entrepreneurship appear in the annual report in at least 40% of total revenues, and for the third and all subsequent years of operation, in at least 50% of revenues. Social

enterprises of type B employ people with special needs. Social enterprises of this type fully carry out marketing activities and work, and include the most vulnerable categories of people in the labour market (at least a third of these workers of all employees). Pursuant to Article 19 of ZSocP, the type B social enterprise should provide a proof of employment of workers and their structure within two years after receiving the status approved by the relevant ministry.

The Slovenian legal system does not provide the creation of social enterprises of mixed type, but it is possible to organise a social enterprise of either type A or of type B. For comparison: in Italy, there are 20% mixed cooperatives with elements of type A and type B (Fedele and Miniaci, 2010, p. 176).

Social entrepreneurship has received considerable support with establishment of the Council for Social Entrepreneurship, responsible for policies, regulations governing the scope of activities of social entrepreneurship and social enterprise, as well as social entrepreneurship development strategy for the period 2013 - 2016. In Slovenia, ending with 24 June 2016, 162 enterprises have been registered having the status of a social enterprise (Ministry of Economic Development and Technology - MEDT, 2016), which is still far below the EU average. The current register does not cover the entire spectrum of social enterprises in Slovenia. The reason for this is partially the strict criteria to maintain the status of a social enterprise, and there are no public financial advantages offered separately from the existing measures of MEDT. The main legal forms taken by social enterprises are considered to be institutes, associations, cooperatives and other organisations that carry out economic activities.

According to Article 31 of ZSocP, a municipality can plan, finance and implement development policies and social entrepreneurship in the municipal or regional level. This possibility represents a huge opportunity for rural development. Studies have shown that social entrepreneurship is the greatest potential for rural development activities, such as organic agriculture, tourism, environment (ecology) and social and family protection (Hafner et al., 2013). Social enterprises must, pursuant to the Article 4 of ZSocP, operate in accordance with recognised principles of public benefit and social character.

In the case of the type B social enterprises, it must be specified in the founding document (corporate charter) which vulnerable groups will be employed. According to ZSocP, the way of managing a social enterprise is based on the principle of equality. Similarly, the social enterprise has an obligation to the workers and volunteers, who are not members of social enterprises, to enable participation in the management, and to have at least an influence on the important decisions. ZSocP also foresees the setting up of a supervisory body that will supervise the correctness of managing financial and material resources.

Social enterprise can distribute a portion of profits or surplus income to the members in the amount that does not exceed 20% of the profits or surplus income in a given year. Salaries of employees in social enterprises must not exceed more than 30% of the earnings rate for each tariff class. During the period of co-financing, a dismissal cannot be given to the members of the most vulnerable groups.

ZSocP has caused a greater number of criticism, pointing to a series of disadvantages. According to the critics, the Ministry of Labour, Family, Social Affairs and Equal Opportunities, has too much authority, which in practice reduces the concept of social entrepreneurship to employment of particularly vulnerable groups. The law made a visible difference between work integration social enterprises (WISEs) and other forms of social enterprises. Only a small number of public policies support the social enterprises. According to them, the discussions on social entrepreneurship are less focused on business development and more on social policy. Within the acts of other ministries, social entrepreneurship is not recognised as an instrument of development of social policy. Social enterprises action is limited by obligation of deciding on the principle of one person, one vote.

Among the most important reasons for the small number of established social enterprises in Slovenia are the lack of entrepreneurial and marketing skills of social entrepreneurs, lack of awareness of the public about the role of social entrepreneurship, unrecognition on the market, poor support from the local communities and similar. Obstacles to development of social entrepreneurship are mainly the presence of the informal economy, insufficient coordination of responsibilities between various government departments, lack of support from other ministries and local governments (including access to public procurement markets). Concluding from the abovementioned facts, the legislation of social enterprises is too rigid. For social entrepreneurs, a significant problem is the difficult access to financial resources, which includes more favourable loans for employment, as well as providing guarantees and subsidies from the budget. For this purpose, it is necessary to establish funds for the promotion and development of social entrepreneurship.

3.4 Croatia

Social entrepreneurship in Croatia began in May 2013, with drafting the Strategy for the development of social entrepreneurship for the period 2015 - 2020, which was adopted on 15 April 2015, initiated by the Croatian Ministry of Labour and Pension System, in cooperation with other stakeholders. The goal of the National Strategy for development of social entrepreneurship is to create an enabling environment for developing social entrepreneurship in the Republic of Croatia, legal and fiscal frameworks, financial and technical support to social entrepreneurs, defining criteria and tools for identifying, monitoring and developing social entrepreneurs, and education at all levels in the aim of recognising the importance of social entrepreneurship as the essential components of economic development. The overall objective of the Strategy is to establish an enabling environment for the promotion and development of social entrepreneurship in the Republic of Croatia, in order to reduce regional disparities and to ensure an increase in the level of employment and more equitable distribution and management of social wealth (<http://www.mrms.hr>). There will be four basic measures:

1. the establishment and improvement of the regulatory and institutional framework;
2. the establishment of a financial framework;
3. promotion of education for social entrepreneurship;

4. ensuring visibility.

In order to provide a direct support, the Croatian Employment Service (CES) has applied seven packages of measures aimed at different groups of vulnerable people in the labour market.

Analysts mention some weakness of the Strategy (<http://rasprava.mrms.hr/bill/prijedlog-strategije-razvoja-socijalnogdrustvenog-/print/>). They point out a poor understanding of social entrepreneurship among the key stakeholders. The potential benefits of social entrepreneurship are not yet sufficiently recognised. Institutional support at national, regional and local levels is negligible. Quality and clear legislative framework related to social entrepreneurship is missing. Support instruments available to potential social entrepreneurs (loans, guarantee funds, socially responsible investing, foundations) are not developed.

3.5 United Kingdom

In the UK, there are about 70,000 social enterprises which employ nearly two million people and contribute over £24 billion to the UK economy (British Council, 2015, p. 5). In 2002, a coalition of social enterprises and social enterprise unit of the government were established in the UK. National Strategy led by the Office for Civil Society has three tasks:

- to facilitate the establishment and maintenance of social enterprises (start-ups and exits from the public sector)
- to facilitate doing business of the social enterprise with the state (notably through public procurement for the various services, from labour integration to social welfare services), and
- to bring more resources to the social enterprise sector (through the rapidly evolving market for social investment).

A social enterprise can be established through numerous legal structures, including the Public Interest Company founded by the Government in order to establish branding and recognition of social enterprises. With the launch of Big Society Capital, a powerful impetus has been given to the development of social investment. This body finances all social investments, from incomes generated by inactive bank accounts and contributions of major banks, to social impact debentures. In this way, they want to attract private/charity investors for innovative programs.

The system of labour market support is based on four elements:

- employment services for job seekers;
- a simplified system of tax credits and benefits that will ensure the profitability of the work;
- intensive support to the extended duration of unemployment, or if there are special needs;
- personal support by the compulsory Work Programme after 12 months of unemployment, according to which the contracting service providers are paid by results.

Special measures are being implemented to support youth; through intensive support to acquire work experience, the Innovation Fund was established for early intervention in schools, etc.

4 Conclusion

The practice of some countries, such as Italy and the UK, shows that social enterprises can make a considerable contribution to addressing the problems of marginalised groups, employment of hardly employable groups and development of economy, and therefore the country as a whole.

Analysis of social entrepreneurship in the South-Eastern European countries has shown many weaknesses of the existing legislation and application in practice. Institutional support is insufficient. Quality and clear legislative framework is missing. Instruments of financial support, including loans, guarantee funds, socially responsible investing and similar are not developed. Support from local communities is poor, and also the presence of the informal economy is large. Social entrepreneurship is unrecognised on the market.

There is a large number of people in social need. For these reasons it is necessary to do closer and better defined framework for the development of social entrepreneurship. It should help to the social enterprises to be economically viable. Social enterprises themselves need to make the best of whatever environment they are operating in, and whatever resources available they are using. However, they also need to work together to make that environment as favourable as possible for social enterprise success.

To encourage social entrepreneurship activity, it is necessary to establish funds for the promotion and development of social entrepreneurship. In this regard, local authorities and governments need to create an ecosystem of support and finance (open access to financing from the local budget and further developing opportunities for micro crediting) that encourages the growth of social enterprises all the way from the initial idea to sustainability, profitability and scale. It should work on continuous improvement of skills, capabilities and knowledge of persons in institutions and citizens' associations.

Dr. Rajko Macura, dr. Iva Konda

Socialno podjetništvo: instrument za socialno in razvojno politiko

Globalna ekonomija je v zadnjih desetletjih predstavljena kot zgodba o velikem gospodarskem uspehu in blaginji, kot projekt, ki bo vsem prinesel koristi. Vendar pa dirka za dobičkom terja svoj davek. Neoliberalna ekonomija, katere osnovni načeli sta

dobiček in potrošnja, je pokazala svojo šibkost in nevzdržnost. Priča smo zapletenim gospodarskim, družbenim, kulturnim in ekološkim problemom, ki v številnih državah, še posebno v nerazvitih, povzročajo politično in socialno-ekonomsko krizo. Svetovni inštitut za ekonomske raziskave v sklopu Univerze združenih narodov (UNU-WIDER, 2016) ugotavlja, da se 94 % prihodkov na svetu razdeli na 40 % prebivalstva, medtem ko za preostalih 60 % ostane le 6 %. Po ocenah Svetovne banke skoraj polovica svetovnega prebivalstva živi z manj kot 2 \$ na dan, več kot milijarda od njih je podhranjenih, 2,5 milijarde jih nima osnovnih higienskih pogojev. Podatki iz zadnjih let prav tako kažejo na vse večje razslojevanje, delež prebivalstva, ki živi pod pragom revščine, se v zadnjih letih hitro povečuje. V razmerah rastočega ekonomskega in socialnega pomanjkanja se je sedanja politika socialnega varstva brezposelnih izkazala za preveč drago in neučinkovito. Nove razmere in odnosi zahtevajo inovativnost na področju zaposlovanja in socialnega varstva. Posameznike je treba motivirati in usposobiti, da postanejo aktivni udeleženci družbenih sprememb. Eden izmed najbolj učinkovitih modelov socialnega vključevanja je socialno podjetje, ki kot del socialne ekonomije predstavlja močno orodje za reševanje problemov ekonomske odvisnosti marginaliziranih, socialno ranljivih skupin, pa tudi za reševanje problemov v lokalnih skupnostih.

Svetovna gospodarska kriza leta 2008 je pokazala, da je socialno podjetništvo pomemben dejavnik pri stabilizaciji trga dela. Socialna podjetja so se izkazala za manj ranljiva. Tako se je npr. v Italiji, kjer je kriza močno zmanjšala število zaposlenih, število socialnih kooperativ povečalo za 2,7 %, kar kaže na to, da je zadružništvo dejavnik trajnostnega razvoja skupnosti (Roelants et al., 2012). Neposredni učinek delovanja socialnih podjetij na gospodarski razvoj skupnosti ali regije se kaže v tem, da (Petričević, 2012):

- njihove dejavnosti dopolnjujejo storitve v javnem interesu;
- prispevajo k uravnoteženi uporabi in dodelitvi razpoložljivih sredstev v korist lokalne skupnosti;
- ustvarjajo nova delovna mesta, nekatera socialna podjetja so usmerjena predvsem v vključevanje dolgotrajno brezposelnih na trg dela;
- spodbujajo socialno kohezijo ter prispevajo k rasti in razvoju socialnega kapitala;
- podpirajo institucionalizacijo neformalne podjetniške dejavnosti zasebnega sektorja itd.

Ne preseneča, da socialno podjetništvo, katerega bistvo sta hkratio delovanje v dobro družbe z odkrivanjem in prepoznavanjem družbenih problemov in uporaba podjetniških načel, da bi se dosegle pozitivne družbene spremembe, pridobiva na pomenu. Pravzaprav ga lahko uvrščamo med socialne inovacije, saj socialna podjetja demonstrirajo uspešnost združevanja poslovanja z družbenimi in okoljevarstvenimi temami (Konda et al., 2015, str. 213). Yunus (2009) meni, da so socialna podjetja bolj kot v ustvarjanje dobička usmerjena v neko korist za širšo družbo in na ta način lahko delujejo kot vektor sprememb. Imajo izdelke, storitve, kupce, trge, odhodke in prihodke, vendar pa je njihovo osnovno vodilo družbena koristnost. Yunus ponudi še eno možnost - gre za podjetja, ki si želijo maksimirati dobiček, vendar so ta podjetja v lasti revnih ljudi.

Komisija (European Commission, 2011) navaja, da imajo po velikosti in pravnih oblikah različna evropska socialna podjetja skupne naslednje značilnosti:

- *ustvarjanje dobička ni izključni niti glavni cilj opravljanja dejavnosti;*
- *razlog za opravljanje poslovnih dejavnosti je socialni ali družbeni cilj skupnega dobra, kar se pogosto odraža v velikem številu socialnih inovacij;*
- *ustvarjeni dobiček načeloma ponovno vlagajo v podjetje za uresničitev tega socialnega cilja;*
- *njihovo poslanstvo se odraža tudi v organizacijski strukturi in lastniških razmerjih, saj spoštujejo demokratično načelo, načelo udeležbe ter socialno pravičnost.*

Razlike med državami v Evropi pojasnjujejo trije dejavniki, in sicer (Borzaga in Defourny, 2001): (1) stopnja razvoja gospodarskih in socialnih sistemov, (2) značilnosti sistemov socialnega varstva in tradicionalnega tretjega sektorja ter (3) narava pravnih sistemov.

Italija je v literaturi pogosto omenjena kot pionirka na področju zakonodaje s področja socialnega podjetništva, saj je bil prvi Zakon o socialnih kooperativah sprejet že leta 1991. Za tem je sledil velik porast števila socialnih podjetij, različnih pravno-organizacijskih oblik, ki pa za razliko od socialnih kooperativ niso imele svojega zakona. V letu 2006 je sprejet Zakon o socialnem podjetništvu, ki najprej jasno definira socialno podjetništvo ter določa, da je socialno podjetje oznaka, ki jo lahko pridobi katera koli pravnoorganizacijska oblika (društvo, fundacija, kooperativa ...), če deluje v javno korist. Zakon o socialnem podjetništvu zajema 18 členov, v tem smislu je vsebinsko krajši od slovenskega ZSocP, a vsebinsko bolj strukturiran in natančnejši. Po mnenju Ficija (2006, str. 9) je bistvena pomanjkljivost italijanskega Zakona o socialnem podjetništvu v tem, da ne zahteva demokratičnega upravljanja s pravilom »en človek, en glas«, ki ga poznamo iz slovenskega ZSocP. Avtorja ta pomanjkljivost ne preseneča, saj italijanski zakon določa, da socialno podjetje lahko postane katera koli izmed primernih organizacij, ne glede na svojo pravnoorganizacijsko obliko (kooperativa, podjetje, tradicionalna neprofitna organizacija ali podobno), če le izpolnjuje vsa ostala določila Zakona o socialnem podjetništvu.

V skladu s klasifikacijo EU sodi Slovenija v skupino držav, kjer je koncept socialne ekonomije malo znan in sprejet (Monzon in Chaves, 2012). Po raziskavi Črnak-Megličeve in Rakarjeve (2009) zaposluje sektor socialne ekonomije oz. tretji sektor v Sloveniji zgolj 0,74 % delovne sile. Vse organizacijske oblike socialnega podjetništva pa v EU predstavljajo kar 3 milijoni organizacij oz. 10 % vseh podjetij, ki v EU-27 zaposlujejo okrog 6,5 % delovne sile. Največji delež (70 %) zaposlujejo neprofitne organizacije, sledijo zadruge (26 %) in vzajemna društva (3 %). Podjetja socialne ekonomije so prisotna v skoraj vseh sektorjih gospodarstva, kot so bančništvo, zavarovalništvo, kmetijstvo, obrt, različne komercialne storitve, zdravstvene in socialne storitve itd. (European Commission, 2013).

Do leta 2011, ko je v veljavo stopil ZSocP, Slovenija ni imela zakona, ki bi celovito urejal položaj javno koristnih organizacij. Kljub temu pa je že obstajalo socialno podjetništvo oziroma subjekti, ki so izvajali socialno podjetništvo (zadruge, društva in invalidska podjetja). ZSocP je prvi zakon v Sloveniji, ki natančno definira socialno

podjetništvo, merila za pridobitev statusa socialnega podjetja in ohranitev le tega, ter načine poročanja in spodbujanja socialnega podjetništva. Po tem zakonu je socialno podjetništvo trajno opravljanje dejavnosti socialnega podjetništva ali trajno opravljanje drugih dejavnosti pod posebnimi pogoji zaposlovanja, pri čemer je maksimizacija dobička, ki je posledica prodaje ustvarjenih proizvodov in storitev na trgu, postavljena v ozadje.

V Sloveniji je potencial socialnega podjetništva neizkoriščen. Še vedno je nezadostno sodelovanje med institucijami, odgovornimi za razvoj socialnega podjetništva na nacionalni in regionalni ravni, in pomanjkanje mehanizmov za financiranje naložb v socialna podjetja. Javnost je premalo ozaveščena o pomenu in vlogi socialnega podjetništva.

Formalni začetki socialnega podjetništva na Hrvaškem segajo v maj 2013 s pripravo strategije za razvoj socialnega podjetništva v obdobju 2015–2020. Cilji strategije, ki je bila sprejeta 15. 4. 2015, je ustvarjanje ugodnega okolja za razvoj socialnega podjetništva, pravnih in fiskalnih okvirov, finančne in tehnične podpore socialnim podjetnikom, definiranje meril in instrumentov za prepoznavanje, spremljanje in razvoj socialnih podjetnikov ter izobraževanje na vseh ravneh zaradi prepoznavanja pomena socialnega podjetništva kot bistvene sestavine gospodarskega razvoja. Da bi zagotovili neposredno podporo socialnim podjetnikom, je hrvaški zavod za zaposlovanje predložil sedem paketov ukrepov, namenjenih različnim ranljivim skupinam na trgu dela. Analitiki omenjajo nekaj slabosti te strategije. Predvsem izpostavljajo slabo razumevanje socialnega podjetništva pri ključnih deležnikih in nepoznavanje koristi socialnega podjetništva v širši družbi. Institucionalna podpora na nacionalni, regionalni in lokalni ravni je zanemarljiva, manjka pa tudi kakovosten in jasen zakonodajni okvir v zvezi s socialnim podjetništvom. Podporni instrumenti, dostopni potencialnim socialnim podjetnikom (posojila, jamstveni skladi, družbeno odgovorno investiranje, fundacije), niso razviti.

Z namenom, da bi spodbudila ustanovitev socialnih podjetij po vsej državi, je vlada v Veliki Britaniji leta 2002 ustanovila koalicijo socialnih podjetij in ustvarila Enoto socialnega podjetja v okviru Oddelka za trgovino in industrijo. Od leta 2006 je odgovornost v zvezi s socialnimi podjetji prevzelo na novo ustanovljeno ministrstvo za tretji sektor, katerega namen je izboljšanje strokovnosti sektorja, zagotavljanje dostopa do finančnih virov in dopolnitev pravnih okvirov za večjo rast sektorja. Socialna podjetja se v Veliki Britaniji pojavljajo v različnih velikostih in oblikah, od velikih nacionalnih in internacionalnih podjetij do manjših podjetij v javnem interesu, in delujejo na različnih področjih. Njihove skupne značilnosti so naslednje (British Council, 2015):

- so podjetja s ciljem generiranja prihodkov bolj s prodajo blaga in storitev na trgu kot pa z donacijami in s pridobivanjem nepovratnih sredstev;
- ustanovljena so z namenom, da nekaj spremenijo;
- dobičke namenjajo za nadaljevanje njihovega socialnega poslanstva.

V Veliki Britaniji izvajajo posebne ukrepe za podporo mladim. Tako so intenzivirali podporo pridobivanju delovnih izkušenj, ustanovili so inovacijski fond za zgodnje ukrepanje v šolah in podobno.

Povzamemo lahko, da je socialno podjetništvo močan vzvod socialnih in razvojnih politik. V različnih državah ima različne predpogoje in dejavnike za nastanek in nemoteno delovanje. Z ekonomskega, socialnega in psihološkega vidika predstavlja vključevanje socialno izključenih skupin na trg dela preko različnih oblik socialnega podjetništva pomemben dosežek tako za posameznika kot za družbo.

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