

CONTRIBUTIONS OF THE SOCIAL AND SOLIDARITY ECONOMY TO THE IMPLEMENTATION OF THE SUSTAINABLE DEVELOPMENT GOALS AND THE CONSTRUCTION OF EVALUATION INDICATORS: *THE CASE OF A SETTLEMENT IN ARARAQUARA, BRAZIL*

LEANDRO PEREIRA MORAIS
MIGUEL JUAN BACIC

In Brazil, and in many other countries, the Social and Solidarity Economy (SSE) has been an innovative alternative for job and income generation, and a solution to cope with social and labor inclusion, in the last two decades. It can also be considered a new, more humane and inclusive model of development. This fact contributes to improving the quality of life, both for people and their communities, especially those with social and economic disadvantages. This conclusion led the United Nations to recognize the SSE as one of the auxiliary contributions to fulfilling the Sustainable Development Goals (SDGs). This is because the SDGs integrate and merge the three dimensions of sustainable territorial development: economic, social and environmental. However, at present, we need conclusive quantitative and qualitative studies and methodologies to be able to “quantify” the effective contributions of the SSE to the SDGs. Thus, this article aims to use a real and innovative experience of municipal SSE, carried out in an area of high socioeconomic vulnerability (Monte Alegre Land Reform Settlement), in the Brazilian municipality of Araraquara (SP), to explain its effective contributions to achieving certain SDGs. With this study, which is still being carried out, we also intend to propose a set of indicators for SDGs 1, 2, 5, 11 and 12, which can be applied in the future, as well as to other SSE experiments.

Keywords: social and solidarity economy; settlements; territorial development; ecosystem; indicators; 2030 Agenda, Brazil.

INTRODUCTION

The 21st century is fundamentally marked by two major characteristics that seem to go hand in hand: 1) significant material advances, reflected in the current

Adresele de contact ale autorilor: Leandro Pereira Morais, UNESP – Câmpus Araraquara, Rod. Araraquara-Jaú Km 1 – Machados – Araraquara – SP – CEP 14800-901 Brazil, e-mail: lpmorais@gmail.com; Miguel Juan Bacic, Institute of Economics, University of Campinas, Rua Pitágoras, 353 Barão Geraldo – CEP 13083-857 Campinas (SP), Brazil, e-mail: bacic@unicamp.br.

technological wave, which some call the “4th Industrial Revolution” and 2) increasing poverty, inequality and social exclusion. In other words, despite advances in economic, financial, productive technical infrastructure, information and communication technology, we still live with alarming levels of multidimensional poverty, growing inequality and income concentration, affecting a large share of the world’s population that lacks basic services, education, health, food, housing etc. In this context, the discussion about the role of the Social and Solidary Economy (SSE) as a real and symbolic instrument to cope with this scenario is pertinent. Therefore, it has been presented in recent years as an innovative alternative for job and income generation and as a response to socio-labor inclusion. In general, the SSE comprises a variety of economic and social practices, which perform activities of production of goods, service provision, solidarity finance, trade, fair trade, and solidarity consumption (Morais and Bacic, 2019). One of the pragmatic ways of demonstrating such potentiality is by exposing existing territorial experiences and how such experiences relate to the goals set out in the 2030 Agenda for Sustainable Development Goals (SDGs). This Agenda is an ambitious and transformative action plan for people and the planet and is based on 17 Objectives and 169 goals.

Thus, we understand that one of the main ways of accomplishing these goals is to apply them locally. In Brazil, many municipal administrators and their advisors, in preparing and executing their respective government plans, incorporate goals and actions in different areas that must align with the SDGs. It is necessary, therefore, to systematize them, as well as to use them as an instrument for implementing and disseminating the SDGs as guidelines for local public policies. The SSE is an important ally when considering this task, given its operative elements (self-management, democratic participation and governance, ties with the territory, reciprocity, socioeconomic inclusion, environmental sustainability, etc.) as well as their impacts on the territory.

From this perspective, this article aims to use the experience of municipal SSE policy application to explain some of the contributions necessary to reach certain SDGs. It also shows that it is possible to apply the objectives derived from the 2030 Agenda at the municipal level, from the perspective of the SSE. In addition, it is understood that the findings uncovered, in light of the literature concerning the production of indicators, contribute to the elaboration of a set of indicators that can highlight relations between SSE and SDGs in this territory, and can be applied in further studies.

The case study to be presented deals with a group of activities related to the SSE and performed as a means of generating work and income located in the municipality of Araraquara (SP), Brazil. This is a specific solidarity economy enterprise (SEE), founded in 2008 by the Monte Alegre Female Settlement Association (AMA) by a group of women from this land reform settlement, located in the rural area of the municipality. The association was set up with the purpose of creating a place to produce certain goods, as a work and income generating activity for the families of women living in an area of high socioeconomic vulnerability.

The Association, through “Padoka” – a community bakery set up by this Association – provides food and products of nutritional value, mainly using raw materials of natural origin and without preservatives.

Another form of work and income generation in the settlement is the production of fresh agricultural produce. All experiments target the shortening of production and consumption chains, as well as the close collaboration between small farmers in the region, who supply raw materials such as flour, cassava, honey, etc. In general, the products are marketed in the settlement, in the municipality, at street markets and rural and urban markets, even offering public and private events in the surrounding area.

Recent studies point to the fact that, in addition to the generation of work and income, these experiences have transformed the lives of women living in this area (many of whom are heads of the family), as they now participate in decision-making processes in force in the community, as well as in the municipal participatory budgeting¹. This conclusion indicates an improvement in the living conditions of these women in this territory; in the economic, social and political spheres, since obtaining work and income generation, in addition to economic resources, the emancipation of these women and their participation (“voice”) in the construction of local public policy.

This experience relates to several SDGs, such as numbers 1 and 2 (No Poverty and Zero Hunger); 5 (Gender Equality); 11 (Sustainable Cities and Communities); 12 (Responsible Consumption and Production), etc. Particularly in the case of SDG 1 and 2, the settlers, previously living in conditions of extreme poverty, currently earn a higher income than the national minimum wage (SDG 1), with family income in some cases reaching 2 to 3 monthly minimum wages. In addition, regarding a food production experience, the results also relate to SDG 2, as it ensures food security in the locality.

Methodologically, the study is based on a descriptive analysis of the experience and the mapping of its “ecosystem”, which will encompass and constitute the structure of the article, starting with a brief discussion about the relationship between SSE and SDG. This is followed by a presentation of the entrepreneurial ecosystem for the municipality of Araraquara, and a discussion on the case of the settlement, based on its community bakery (Padoka), identifying advances and challenges for strengthening the experience. In addition, the article will carry out a literature review on the process of building indicators, in order to design indicators that can quantify elements of the SDG and that can be applied to subsequent studies.

Basically, the methodological processes of this work consist of a bibliographic review and technical visits and interviews to the location under analysis. It is worth

¹ Participatory Budgeting refers to the participation of the organized population in the decision-making processes of finance and public policy. This is a kind of “democratic radicalization”, where democracy “is seen not only as a means to achieve better resource allocation, but also as an end in itself” (Pires 1999, 43). (Our translation).

noting that this work is fundamentally part of an action-intervention project (university extension program) carried out by the Center of Extension and Research in Solidarity, Creative and Citizenship Economics (NEPESC) at The State University of São Paulo (in Portuguese: Universidade Estadual Paulista – UNESP – Araraquara), from 2019 to 2020.

SOCIAL AND SOLIDARITY ECONOMY AND SUSTAINABILITY DEVELOPMENT GOALS: A RELEVANT AND NECESSARY RELATIONSHIP

In Brazil and in many other countries, the SSE has been, in recent years, an innovative alternative for job and income generation and a solution for social and labor inclusion. For many, it can also be considered as a new, more humane and inclusive development model (Morais, Dash and Bacic 2017).

The SSE comprises a variety of economic and social practices, which perform activities of production of goods, provision of services, solidarity finance, trade, fair trade and solidary consumption (Morais 2014). The SSE is characterized by a lack of consensus regarding its conceptualization and quantification. A study by the Inter-Agency Task Force on Social and Solidarity Economy (2018), which is an SSE task force within the United Nations, maps different terminologies used in official (government) documents and publications on all continents. This mapping confirms that the large number of terminologies is due to the different modes of generation, achievements and behavior that this sector manifests in different countries.

Despite the various terminologies that exist, SSE can be defined as “a concept that refers to companies and organizations, in particular cooperatives, mutual benefit societies, associations, foundations and social enterprises, which specifically produce goods, services and knowledge, while pursuing economic and social goals and promoting solidarity” (Borzaga, Salvatori and Bodini 2017, 36). Álvarez (2018, 6) synthesizes the SSE as a set of socioeconomic practices that “combine cooperative entrepreneurship with the association of people trying to fulfill needs”.

In addition, we observe that SSE organizations offer comparative advantages in addressing social, economic and political challenges around the world, including social cohesion, empowerment and recognition of a plural economy. First, they are often created from the ground up, emerging within local communities. Second, volunteers play an active participatory role, often taking part in setting up and starting cooperatives. Third, their activities generate surpluses, which are distributed to their owners.

Consequently, the governance structure also tends to be more inclusive and democratic, providing different types of partners (workers, members, volunteers, users, etc.) with a voice within the collective decision-making process, enabling community empowerment and supply and demand for local services.

Such characteristics led the United Nations to recognize the SSE as one of the auxiliary paths that can contribute to the construction of more inclusive and

sustainable development “models”, currently expressed by the SDGs (United Nations 2010, 2014). Thus, the SDGs are integrated and merge the three dimensions of sustainable territorial development: economic, social and environmental. It should be kept in mind that the SDGs comprise an ambitious set of seventeen objectives and 169 goals, defined and developed through broad dialogue among United Nations Member States, local authorities, civil society, the private sector and other stakeholders².

According to Utting (2018), the SDG methodology per se can mask sub-national level deficit outcomes, as well as risk diverting attention and policy resources from marginalized groups. The concept of SSE necessarily meets the SDG’s objective of “leaving no one behind”, by redirecting attention to local territories and vulnerable groups and thus emphasizing active citizenship and participatory democracy, which are essential to meeting the demands of marginalized groups. This stems from the fact that SSE acts directly with people and within their territories, ensuring a bottom-up approach that is closely linked to the real demands of communities.

Also, according to the author, several reports identified links between the SSE and specific objectives and called on governments and multilateral organizations to include SSE in their discussions and planning related to the implementation of the SDGs. Utting (2018) listed four SDG thematic areas: food security/sustainable agriculture, access to social services, women’s economic empowerment, and employment/ decent work.

Another study that discusses the relationship between SSE and the SDGs is the research on Seoul, carried out by UNRISD (2018). According to this research, the implementation of the SDGs at the local level, through mechanisms of democratic governance and local planning and execution, is crucial.

However, we still need to develop well-defined methodologies to quantify the socio-territorial impacts of the experiences of social or cooperative enterprises in their respective territories. The complexity of the phenomenon – not only given the economic impacts, but also social, political, cultural and environmental – also requires the combination of quantitative and qualitative methodologies. This is an important topic on the SSE research agenda. According to UNRISD (2018), although the positive impacts of the SSE in their respective territories are evident, we still experience the “underdevelopment of methodologies to collect and analyze data on the impacts of SSE” (p. 17).

From the quantitative point of view, there were advances, shown through two studies: International Labor Organization (2017) and Monzon and Chaves (2017). The first presented an overview of how the key variables of SSE are measured. However, they only present the traditional measurements of employment and productivity. On the other hand, the second study analyzed 28 European countries

² These documents can be found at: [http://www.unrisd.org/80256B3C005BB128/\(httpProjects\)/51FF4ADFC37CEE3DC125829500498071?OpenDocument](http://www.unrisd.org/80256B3C005BB128/(httpProjects)/51FF4ADFC37CEE3DC125829500498071?OpenDocument).

and represented a leap forward regarding the quantitative information on SSE, up to the year 2015. However, both recognize the fact that this task is still at an embryonic stage and presents a challenge for our times.

It is also important to mention the efforts made at the International Conference on Labor Statistics (CIET), held in October 2018, in Geneva (ILO headquarters)³, where methodologies that will assist in this major challenge of quantification were discussed and advanced.

From a qualitative point of view, it is worth mentioning the work of Castro and Oreamuno (2017) that suggests a different approach to understanding the impacts of the SSE in their respective territories, beyond the traditional quantifications of the generation of income and jobs. According to the authors, this is due to the fact that “instead of producing specific impacts, cooperatives develop a range of social roles within their communities, which means they influence the dimensions of development more dynamically” (p. 148).

In other words, complex social phenomena require “holistic” measures and metrics of understanding that, in this case, were created from four analytical categories inspired by the United Nations Human Development Report, namely: health, education, income and public goods and services – collective capacities.

Álvarez and Alárcon (2019) try to relate the theory of cooperative principles and the economic theory of social transfers as conceptual support to generate a concrete tool for scaling the contributions of the SSE to the implementation of the SDGs.

The major challenge will be to merge quantitative and qualitative methodologies to construct a metric that is effectively able to measure the complexity of the impacts of SSE experiences in their respective territories (Morais and Bacic 2018). In dealing with this problem, the next topic presents the experience in Araraquara (state of São Paulo), which can be used as a case study to create ways to record and measure the inextricable relationship between the SSE and the SDGs.

THE ENTREPRENEURIAL ECOSYSTEM FOR THE SSE IN THE MUNICIPALITY OF ARARAQUARA (STATE OF SÃO PAULO)

The entrepreneurial ecosystemic construct for the SSE

One of the major challenges of creating, maintaining and strengthening SEEs is the effective establishment of an entrepreneurial ecosystem for the SSE. According to Spilling (1996), an entrepreneurial ecosystem is a community within a region of interdependent actors, with diverse interacting roles, determining the ecosystem's performance and ultimately the entire economy of a region.

We understand that the formation of the entrepreneurial ecosystem for the SSE is a fundamental step towards the emancipation of the SSE. One of the major

³ https://www.ilo.org/global/about-the-ilo/newsroom/news/WCMS_646530/lang--en/index.htm.

problems of SSEs is that the prerequisites for the construction of the “emancipatory space” or the “space of autonomy” are skills and resources that are not available to most people that participate in self-management groups. For this reason, it is not possible to simply copy and reproduce the institutions that operate within the entrepreneurial ecosystem – including traditional companies – when we think about the articulation of a set of institutions and actors that are expected to act on behalf of the SSE. These enterprises should have characteristics which lead to socio-economic, political and cultural implications in their territories, different from those that can be found in traditional companies (Morais and Bacic 2019).

Thus, it is clear that the construction of the entrepreneurial ecosystem is a complex task, marked by many challenges, resulting from the fact that the concept is recognized as something systemic and dynamic. When it comes specifically to the entrepreneurial ecosystem for SSE, such complexity and challenges intensify, given the very inherent structural weaknesses that characterize the SSE, as well as the field of institutionalization of its policies, which is still open to change and development.

In general, as Serrano systematized (2015, 173), ecosystems are “networks of actors” (entrepreneurs, researchers, funders, politicians – executives and legislators, etc.) that take into account the physical-territorial and cultural dimensions of the territory concerned. This territory is marked by a set of systems, such as: a) political systems (alliances and coalitions among the social actors and the political actors that form the basis for territorial governance); b) production systems (which induce the creation of networks of actors involved in the production of goods and services) and c) territorial innovation systems (created by some groups of actors involved in the generation and diffusion of innovation). Such systems make up a “physical component” with sociological, political and economic consequences. The author also finds that the ecosystem construct must take into account the need to promote “self-reflection”, that is, to be able to carry out an “endogenous” analysis, through research, the creation of statistics and analysis of impacts as well as the need to open and strengthen ties with social movements.

Another important aspect for the construction and maintenance of the solidarity entrepreneurial ecosystem consists of “community participation” processes (Bajo 2017). According to the author, the success of the emergence and maintenance of SSE in its respective territories (in the specific case of this study, the cooperatives), depends on community participation. This participation leads the community to adopt a protagonist role in the process of constructing their own citizenship, their inclusion in the process of co-construction of rules and practices, i.e., as fundamental participatory actors in the co-construction of territorial public policies.

Drawing on some other studies on the SSE ecosystem, we understand that a coherent proposal for a structure for the SSE-driven entrepreneurial ecosystem includes: a) knowledge, political awareness and legal ways of recognizing policies and actions; b) access to the market; c) public and fiscal support for start-ups; d) access

to finance; e) tools to promote mutual support networks; f) research development and capacity building in the area (European Commission 2016; Kim and Jung 2016; Morais and Bacic 2019).

Based on this structure, it is worth presenting how this ecosystem has been co-built in the city of Araraquara.

Entrepreneurial ecosystem for SSE in Araraquara (state of São Paulo)

According to data from the State Data Analysis System Foundation (Seade), the Brazilian municipality of Araraquara, located in the central administrative region of the state of São Paulo with an area of 1,003.63 km², has a population of 222,791 (2017), Gross Domestic Product (GDP) of R \$ 7.98 billion (2014), a per capita income of R \$ 36.7 thousand (2014) and a share of GDP of 0.43% (2014).

Considering its productive diversification, agro-industry stands out in the region, and is the main anchor of Araraquara's economy. The clothing, textile and metal and mechanical industry sectors are also very important. The sectors related to the agroindustrial activities of citrus processing, sugar and alcohol, prevail and determine the regional dynamics. In the metalworking industry, there are many industries linked to the agroindustrial segment, but the recent presence of the aeronautical segment also stands out with the implementation, at the beginning of the century, of a unit of Embraer, an important Brazilian company. In metallurgy, the power generation sector has also been important since the 1970s. Additionally, it is worth mentioning that the city of Araraquara is an important center for trade and services for the entire region, including universities and research centers.

Specifically regarding the SSE in the municipality, according to Fonseca et al. (2014), the idea was first introduced in 2004, when the Center for Sciences and Languages of UNESP created the Center for Studies in Solidarity Economy and Citizenship – NEESC. In 2005, the City Hall created the Solidarity Economy Coordination, linked to the Secretariat of Economic Development. At the end of 2007, with the publication of a project call notice in the context of the National Program of Popular Cooperative Incubators – PRONINC (federal government program), an incubator of social and solidarity economy enterprises was created on UNESP's campus in Araraquara, in partnership with a group of professors and students from the Franca campus of the same University.

As Fonseca and Grigoletto (2012) remind us, the approval of the project, at the end of 2008, was the motivating factor for the start of the Incubator's activities, although the material conditions were only created in 2011. Among the activities, emphasis should be given to the Araraquara Solidarity Economy Forum, which took place in 2008, in which the groups exchanged experiences. The main result of the Forum, however, was the elaboration and approval of the Charter of Principles of Solidarity Economy of Araraquara. Another important achievement during this period was the approval of the Municipal Solidarity Economy Law, in late 2009.

This Law represented a guarantee that SSE actions would be maintained, despite the subsequent government changes.

Map of the State of São Paulo, Brazil



Source: Google Maps.

The year 2017 was a milestone for the SSE movement in Araraquara. The main objectives were given by the new municipal administration, which took office in January.

The following initiatives and actions should be highlighted as signaling measures:

a. strengthening and promotion of the Municipal Coordination of Solidarity Economy, including their transformation into **Coordenadoria Executiva de Trabalho, Economia Criativa e Solidária** (Executive Coordination of Work, Creative and Solidarity Economy);

b. holding of the **1st Municipal Conference on Creative and Solidarity Economy of Araraquara** / state of São Paulo, with the theme “Local Economic Development with Decent Work: Income Generation and Social Inclusion”, organized collectively by the government and civil society, where proposals that supported the elaboration of the 2018–2021 Multiannual Plan and the Municipal Plan for Solidarity Economy were debated and deliberated;

c. as a result of the Conference, the **Municipal System of Creative and Solidary Economy** was created; and

d. inclusion, in the municipality's Annual Budget Law for 2018, of approximately R\$ 986 thousand, intended for investments and current expenses applicable to the Creative and Solidary Economy.

In addition, we should mention that the current Mayor is also Vice-President of the **National Front of Mayors in Solidarity Economy**⁴, which in turn is in close contact with the **Network of Public Administrators**. Both organizations contribute with the creation of spaces for debate and the proposition of adequate means to foster the development of the solidary economy and to stimulate partnerships among the municipalities and the state and federal governments.

Therefore, we observe that the SSE is strategic, and a fairer, more equitable form of income generation, organization, production and social relationship, in the human, social, cultural, political and economic dimensions. Thus, the SSE is an important instrument to implement the SDGs in the territory and, consequently, to improve the living conditions of the population, in particular the most disadvantaged.

In addition, it is important to observe that Araraquara's public administration, which began in 2017, has established among its goals, the building of a "participatory and solidary city", seeking to implement a government program divided into four main axes: "Democratic management and popular participation". "Transparency and social control". "development and sustainability". "Quality of life and the realization of social rights". Major decisions are made through the participatory budget and the Municipal Councils (such as those regarding the elderly, youth, women, racial equality, people with disabilities and the LGBT population etc.). These instruments guarantee a broad debating process, with the participation of the population, which deliberates the investment plan for the following year's budget, adopting a practice of transparency in management and full public control. All programmatic elaboration seeks to remain in line with the SDGs, from the axes that guide public policies, through the proposal of democratic management and social control (Silva 2017). In this sense, the current management of the city is guided by the need to strengthen the SSE, conceiving it as an organizational instrument of the local and regional economy, as well as being responsible for structuring the adoption of new values within local community relationships.

SSE Municipal Conference in Araraquara (state of São Paulo): a fundamental instrument of an ecosystem for the SSE

We understand that State as well as governmental policies⁵ are of fundamental importance for the maintenance and sustainability of an ecosystem, as they may

⁴ <https://www.facebook.com/FrenteNacionaldePrefeitos/>.

⁵ "State" policies are institutionalized and, regardless of government changes (every 4 years in Brazil's case), they do not change or come to an end, as is usually the case with "government" policies.

come to an end or lose support and power when governments change. This may occur at federal, state or municipal levels. In this sense, when it comes to the municipal sphere, it is believed that the institutionalization of public policy for a particular sector (in this case, the SSE) is a relevant way to expand the capacity of the existence and maintenance of the SSE in their respective territories.

This topic will address certain issues discussed at the SSE Municipal Conference, understood as of great relevance for the institutionalization of public policy for the SSE and the strengthening of the SSE ecosystem in Araraquara. In the case of the SSE Municipal Conference in Araraquara, among the main themes and demands that emerged in a participatory and consultative manner to its members were: a) To map formal and informal enterprises; b) Create and regulate the Law and the Municipal Council for Creative and Solidarity Economy; c) Create and regulate the Municipal Fund for Creative and Solidarity Economy, as a permanent source of funding for the financing of incentive and credit projects and programs; d) Create a Public Center for the Creative and Solidarity Economy, a physical space focused on the development of public policies to support, foster, develop and commercialize, and train public policy managers and integrate these policies; e) Implement the SSE municipal public incubator; f) Create SSE product certification instruments; g) Implement incentive policies for the creation and consolidation of urban and rural enterprises, linked to organic and agroecological production.

One of the main outcomes of the Conference was the sanction in November 2017 of Bill no. 317–17, establishing the Municipal Plan for a Creative and Solidarity Economy. This Plan consists of 19 guidelines for the period 2018–2021.

As a complementary part of the ecosystem, it is worth mentioning the founding of the previously mentioned NEPESC – UNESP in 2017, on its Araraquara Campus, in the state of São Paulo; a group formed by professors and undergraduate and graduate students, who work with research in the area of SSE and the Creative Economy, as well as in various interventions with SEEs and the local government. Among the activities presently conducted by the group, is the continual elaboration of mapping the municipality's SEEs and their current state of operation.

Through visits that had already been carried out in the research, we will analyze the Monte Alegre Settlement, where an important section of the territory's SSE is located, combining the production of small settled producers and their purchase and sale connections through the Padoka community bakery, which will be discussed below.

THE EXPERIENCE OF SETTLEMENTS IN ARARAQUARA (SÃO PAULO STATE)

The history of the Monte Alegre Settlement dates back to the extensive conflicts in the rural area. These conflicts took place up to the time when 38 rural settlements in the state of São Paulo, including the Monte Alegre Settlement covering 1,300 hectares,

were regulated between 1984–1992. The settlement is located in the midst of a territory where modernized agriculture predominates, with a strong presence of the sugar-alcohol complex and citrus agro-industrial complex. Therefore, it is necessary to act to strengthen productive diversification, according to new production and consumption patterns (Morais and Borges 2010). From this perspective, in relation to polycultures, annual crops such as corn, cassava, beans, and perennial crops, especially orange, lemon, mango, guava and coffee, which highlights the great diversity. Olericulture is also significant, with the planting of various vegetables, leaves, roots and fruits, as well as dairy cattle raising, sheep farming, poultry and laying poultry, as well as small family agribusinesses for the production of cassava flour, cassava starch, panela, brown sugar, sweets, breads, jams, honey and cheese.

This production is largely directed to families' self-supply; the surplus is exchanged between residents and sold at street fairs, public and private events, as well as in Padoka itself, which has become well-known among settlers as well as locals and tourists from the region.

Settlement photos – path and production



Source: author's photos (2018).

An important destination for this production came via the creation of “Padoka”, by the Monte Alegre Female Settlement Association. The objective of Padoka was to offer products of quality and nutritional value, using mainly raw materials of local and natural origin. At Padoka, the relationship between buying and selling, whether of raw materials (between settlers and the Association), as well as of finished products (between Padoka and the community) is based on the idea of shortening production and consumption chains, which enables partial elimination of the “middleman”, guaranteeing a close collaborative relationship with the small farmers from the settlement, as well as better cost conditions and greater internal circulation of income within the settlement.

Currently, Padoka relies on the effective participation of the work of four women from the settlement, and in periods of high demand (weekends and holidays), 8 more

women get together to carry out the work (production and sales). Each woman represents a family in the settlement and largely makes up the majority of the income of these families. In addition to the economic gain, it is worth noting the social, political and cultural gains for these women. Padoka is represented on the Municipal Solidarity Economy Council and, therefore, has an active voice in the elaboration and implementation of local public policies. Another important aspect is the process of “family emancipation” gained over time. Additionally, Padoka is registered as an important instrument to boost domestic income in the area, as many settlers sell their respective products to the bakery (as inputs) and then buy Padoka’s final products. Padoka is strengthening as a rural tourism area in the region and is already a route for cyclists who come from many other areas every weekend.

This experience of a community bakery, which is a kind of social innovation, has the potential to be replicated in other areas of the city, as an instrument for generating work and income, as well as greater social participation involving the most marginalized people and groups in society.

In search of a quanti – quali valuation

The construction of indicators

The evaluation and quantification of SSE projects and experiences, as well as their impacts on their respective territories, presents a major challenge in the 21st century. Generally speaking, there is still a lack of well-defined methodologies to quantify the socio-territorial impacts of SEE experiences. The complexity of the phenomenon – given its economic, social, political, cultural and environmental impacts – also requires merging quantitative and qualitative methodologies. This is an important topic in the research and extension agenda.

Based on this conclusion and in order to contribute to this challenge, we suggest starting such a venture by discussing the development of indicators, as these are the tools that will enable the conception of the “metric” of the entire process. The specialized literature on the subject presents extensive information that guides and describes the technical and operational development of indicators.

Some approaches and definitions of indicators were systematized by Kayano, Simião and Kruger (2003); the main concepts are as follows: “A set of variables that measures quantitative and qualitative characteristics, considered significant in the development of a plan, definition of its context and results”; “A variable whose purpose is to measure transformation into a phenomenon or process”; “Signs or evidence that allow us to verify to what extent the observed phenomenon is undergoing variations through the intervention performed”; “A measurement instrument used to indicate changes in the social reality that interests us”; “A ruler or a standard that helps us measure, evaluate or demonstrate variations in some dimension of reality relevant to the objectives of a given project”; “Objective and measurable parameters used to operationalize concepts”; “Qualified and / or quantified parameters that

serve to detail the extent to which project objectives have been achieved within a defined time frame and in a specific location”; “A signal which aims to express some aspect of reality in a way that we can observe or measure it” and “Measures that are used to answer (evaluation) questions”.

In general, when people and institutions invest time and resources in communities, they inevitably want to know what difference this investment is making and how it could be more effective. The root of the word “evaluate” is to determine value, and evaluation is an important tool for institutions and communities, including understanding, supporting and engaging with local development (Neumann 2004).

In summary, certain key terms or ideas involving the indicators can be extracted, as well as their importance as assessment and monitoring tools.

Table no. 1

Indicators: key ideas and applications

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|---|
| <ul style="list-style-type: none"> – marks, signs, ruler, evidence; – measures, measurement, parameter; – observe, demonstrate, evaluate; – change, transformation, variation; – reality, phenomenon, process, path; – objective, destination, goals. |
|---|

Source: Own elaboration based on Kayano, Simião and Kruger (2003).

Based on this view, indicators are instruments for controlling the administration, verification and measurement of the efficiency and effectiveness of both private and public administration and third sector and SSE institutions and entities, as they make it possible to compare situations among localities (territorial spaces) or different periods of time in the same municipality.

According to Kayano and Caldas (2002, 294): “Indicators are the description by numbers of a particular aspect of reality, or numbers that are related through several aspects”.

Dewar, quoted by Neumann (2004, 114), suggests that there are two very different approaches to evaluating socioeconomic projects in communities: the “scientific” (scientific models and methods that intend to prove cause-and-effect relationships and yield final judgments about programs and actions) and the “appropriate” (seeks to describe and learn about what is being done, aiming to inform and support those leading the work). Such a division of approaches refers to the fact that, in the context of a community, it is very difficult to establish cause and effect relationships between an activity and the desired impacts, since a number of variables that influence local transformations are at stake.

We must therefore think of an indicator not as something that ‘measures’ reality, but rather that participates in the social construction of reality. To this end, the adoption of the systemic view of indicators is suggested. An indicator system

can be an important advisor and monitoring tool to enhance social practices on a daily basis and over time. However, discerning the composition and outline of an indicator system, implementing and refining it progressively, and operationalizing it over time and drawing from it in order to move forward, changing behaviors or reordering strategies does not always constitute a simple task.

In this sense, knowledge of a series of indicators can guide its construction. There are a variety of indicator systems, such as those to monitor insertion within civil society (monitoring some socio-economic indicators and/or suggesting institutionalization of other indicators); monitor the effectiveness of the intervention via impact indicators; measure efficiency through performance indicators that relate resources and results; identify and evaluate the intensity of participation, through self-evaluation indicators, among others.

From this perspective, no particular standards were identified regarding the construction of a system of indicators for project evaluation and monitoring in territories and communities. Given the heterogeneity (themes, functions, objectives, regional characteristics, etc.), we suggest the designation of methodological parameters for the construction and implementation of the indicator system.

Some of the parameters that we must take into account are:

- a) political dimension of the indicators: in light of their objective of monitoring and evaluating advances in democratic and citizenship practices;
- b) different levels of indicators: which result from the different social practices involved and intended, in an attempt to capture the macro and microsocial dimensions of action;
- c) different functions of the indicators: from those intended to evaluate the degree of participation of the actors in their social practices, to those connected to their management and dialogue practices among different social subjects with different interests;
- d) specificity and multiplicity of indicators: among the possible indicators, each institution/ project will seek to have a set of indicators that responds more closely to its specific needs. There are no general patterns.

As observed by Kayano and Caldas (2002), one of the fundamental characteristics of the indicators is that they establish a normative standard from which to evaluate the social state of the reality in which we want to intervene, constructing a diagnosis that feeds the process of definition of strategies and priorities. In other words, the performance of policies and programs is evaluated by measuring the degree to which their objectives have been achieved (effectiveness), the level of resource utilization (efficiency) or changes in the social status of the target population (impact).

This means that indicators should not be used and understood in themselves, but rather as tools within a larger system that will enable us to verify whether or not changes have taken place, as a result of the interventions performed. The indicator system, therefore, must be: changeable, flexible, dynamic, renewable and resignifiable within the context. This, therefore, lies in the fact that, since the indicators respond

to the conjunctures of the organization/ society, as well as to the different dialogues intended, they are dynamic and change with each new stage of the work. Flexibility is also due to the necessary changes during the process. For example, when the indicator cannot provide an answer to the questions posed during its elaboration. On the other hand, when the indicator system shows that the objectives are not being met, it may be an indication that the action needs to be reevaluated and reformulated.

In some cases, especially in the case of socioeconomic projects, Kayano, Simião and Kruger (2003) advocate the view that the focus should be more on process analysis and less on products, enabling an overall reading. In addition, the micro-macro dimension should contemplate a constant dialogue with other indicator systems.

Having made these initial considerations, the central problems that must be carefully addressed when developing the indicators are given as: a) clarity of what is to be measured; b) quality and precision in the production of the information that will compose the indicators; c) caution and care in the interpretation of available information and d) appropriation and understanding of the indicators by society. Thus, the following are important characteristics of an indicator:

Table no. 2

Important characteristics of an indicator

- simplicity – ease of understanding;
- validity/ stability – relationship between concept and measure;
- selectivity/ sensitivity/ specificity
- express essential characteristics and expected changes;
- coverage – breadth and diversity;
- independent – not conditioned by exogenous factors;
- reliability – data quality (collection, systematization and standardization);
- low cost/ easy to obtain/ periodicity/ disaggregation;
- data production, maintenance and viability.

Source: Own elaboration based on Kayano & Caldas (2002).

Concerning the practical aspects of the construction of an indicator, *Table no. 3* below presents some considerations that should be taken into account.

Complementary information on certain tools aids the construction of indicators. Basically, we must consider quantitative and qualitative tools.

Quantitative tools include:

a) **Formal sample consultations:** a set of standardized questions directed at a representative sample of the population, in order to ascertain specific facts;

b) **Random sample:** scientific research tool, with the basic function of determining which element of a reality under study (population or universe) should be studied, based on an inference on this population;

c) **Interviews based on questionnaires:** also known as “structured interviews”, since they are based on questionnaires and questions presented in the same order to each of the interviewees;

Regarding **qualitative tools**, we can use:

d) **Interviews with “key informants”**: understanding “key informant” as anyone who can provide detailed information, taking into account their experience and knowledge of the research topic;

e) **Focal groups**: collective research tool, developed in specific groups and focused on the plurality of attitudes and experiences, usually in a short period of time;

f) **Direct observation**: a technique that consists of the careful observation of a specific situation, based on notes and recordings of information for further analysis;

g) **In-depth interviews**: individual interviews to obtain desired information;

h) **Analysis of successful practices**: verification of successful practices in a given context, to study the lessons learned or to evaluate their possible applicability in other contexts.

When it comes to developing indicators to “measure” the contribution made by SSE experiences to the implementation of the SDGs, the complexity of the challenge must be acknowledged. According to Jannuzzi and Carlo (2018, 13), “adjusting the 2030 Agenda for sustainable development to national contexts is certainly one of the major challenges to be faced in the coming years.” The authors give that:

“The SDG Agenda favors, in the technical context, the reflection and production of new public statistics and the improvement of methodologies to make comparable the social indicators of different countries with different institutional regimes. This is a new effort to develop statistical systems, which is distinguished – by methodological developments as well as political and institutional implications – from the preceding processes of producing social and economic indicators” (Jannuzzi and Carlo 2018, 17).

However, according to these authors, experts on the subject, “the fact is that there is no way to produce social, economic and environmental indicators that respond to the 2030 Agenda without investments in human, technological and research resources” (Jannuzzi and Carlo 2018, 13). The Brazilian Institute of Geography and Statistics (IBGE) presents some proposals of indicators for each SDG (IBGE 2019) on its site.

On the one hand, based on these IBGE suggestions and, on the other hand, given the knowledge of the territory under analysis in this research, in addition to the mapping currently being carried out by NEPESC, we suggest some indicators that may be linked to the SDGs involved in these actions, namely: 1, 2, 5, 11 and 12. Given the scope of the study, emphasis should be given to the first two.

It is worth mentioning that, as this research and university extension project is still in progress, data on the actual experience are not yet available. Such indicator proposals according to different territories will compose subsequent parts of this work.

In the case of SDG 1, “by 2030, eradicating extreme poverty for all people everywhere, currently measured as people living on less than \$ 1.25 a day”, findings show that producers working with Padoka, as well as its employees, currently earn

(since entering this venture) an income of around 2 minimum wages, therefore above the poverty line established in Agenda 2030.

We intend to analyze complementary indicators suggested by the IBGE to calculate the results of this SDG in the region, such as the proportion (%) of the population: i) below the poverty line by sex, age and working condition; ii) living at home with access to basic social services and iii) adults with guaranteed land tenure rights, legally recognized documentation and perceiving their land rights as safe.

In addition, the economic losses in relation to the total production of the enterprise and of the settlers' production can be identified, as can the proportion of the production that is destined to public market guarantee programs such as the Food Acquisition Program (PAA) etc.

Regarding SDG 2, "Zero Hunger", it is also observed that the experience under analysis contributes to this challenge, since part of the production in the settlements is exchanged among residents and part is sold. In addition, as mentioned previously, production techniques are based on agroecology, which enables sustainable agriculture without the use of pesticides and harnessing crops. All of these experiments were performed through the SSE and its guiding principles.

Conversations with settlement leaders indicate that after Padoka was set up, along with its surrounding production chain, production aimed at self-consumption and commercialization implied that the problem of hunger among the residents was dealt with, either by access to the food itself, or due to its sale and consequent generation of additional income. That is, we observe, albeit in qualitative terms, another interesting impact of SSE in this territory.

With the help of professionals from the University in this region, we also intend to find out whether there is (and in what proportion) a malnourished population in the region, with data on age; as well as information regarding the volume of production per unit of work; proportion of agricultural area under productive and sustainable agriculture; volume of agricultural subsidies for local production etc.

Allied to these quantitative indicators, it is considered pertinent to include qualitative valuations, considering the extent of the territorial socioeconomic impacts that involve these experiences. Such a challenge requires semi-structured interviews to detect, considering these SDGs, the community's perception of food security and its benefits; women's participation in political decision-making spaces; changes in the family relationship with women's income, etc.

Other goals can be linked to this experience, such as goal 5 (Gender Equality), 11 (Sustainable Cities and Communities) and 12 (Responsible Consumption and Production), in view of the broad participation of women in the community in economic, social and political terms, as well as the productive system used and its "green" and community-oriented techniques that seek to integrate agroecological production and organic food.

Accordingly, for subsequent studies, we intend to identify from the standpoint of SDG 5: i) the proportion of women and girls who suffered physical, sexual or psychological violence; ii) whether or not there is a legal framework in

place to promote, reinforce and monitor gender equality and non-discrimination;
 iii) the proportion of time spent on unpaid domestic work and care by gender;
 iv) the proportion of women in managerial positions.

Additionally, regarding SDG 11, information can be obtained on: i) the proportion of the population that has access to public transportation; ii) the proportion of the settled population with direct participation in local urban planning and management; iii) the existence of local risk reduction strategies and sustainable building practices.

In relation to SDG 12, it is possible to map: i) the rate in the decrease of food production and consumption and ii) the use and destination of solid waste, as well as progress in the elaboration of sustainable action plans.

The chart below was elaborated in order to: i) systematize a proposal of basic indicators for the treatment of territorial actions and experiences aligned with SDGs 1, 2, 5, 11 and 12, including possible application in other territories and ii) conceive a starting point (“T0”) to move forward in the creation of monitoring impact metrics for experiments and their actions in territories:

Table no. 3

Proposal of basic indicators – SDGs 1, 2, 5, 11, 12⁶

SDG	Suggested Indicators
1	% Population: i) below the poverty line (\$ 1.25 a day) by gender, age and working condition; ii) living at home with access to basic social services; iii) with guaranteed tenure rights % of production for public market guarantee programs like PAA
2	% of population malnourished by age and gender Information on production volume per unit of work % of agricultural area under productive and sustainable agriculture; Volume of agricultural subsidies for local production
5	% of women and girls who suffered physical, sexual or psychological violence Whether or not there is a legal framework guaranteeing non-discrimination by sex % of time spent on unpaid housework and care, by gender % of women in managerial positions
11	% of population that has access to public transportation % of settled population with direct participation in local urban planning and management Existence of local risk reduction strategies and sustainable building practices.
12	Rate of decrease in food production and consumption Use and destination of solid waste Elaboration of sustainable action plans

Source: Author's elaboration adapted from IBGE – ODS (2019).

⁶ It is important to clarify that these proposed indicators were initially inspired by the Brazilian Institute of Geography and Statistics (IBGE), as indicators arising from a wide discussion with a team formed to create metrics for the SDGs at national, regional, provincial and or municipal levels in Brazil. From these suggestions, these indicators were adapted to meet the reality of the territory and the experience studied.

FINAL CONSIDERATIONS

As we intended to show, there is a positive relationship between local SSE experiences and effective possibilities to fulfill particular SDGs, as these reported experiences are rooted in the local economy and seek inclusive and sustainable development.

However, it is important to mention the challenges involved in addressing Padoka's existing structural weaknesses as well as those related to the producers involved. As in most SEEs, the producers face economic difficulties that imply problems of financial sustainability of enterprises. According to a survey conducted by DIEESE (2017), concerning the process of commercialization of the SEEs in Brazil, the main difficulties reported were: lack of working capital; inadequate marketing structure (physical space, equipment, etc.); competition and existence of middlemen and monopolies; high cost of transportation; difficulties in maintaining regular supply; inadequate prices; difficulty finding customers on a large enough scale; precarious roads; lengthy deadlines for customer payments and a lack of formal registration for commercialization (preventing issuing invoices).

Considering these challenges, the idea of the ecosystem is justified by the creation, maintenance and strengthening of an integrated set of actors (university, public and private sectors, trade unions, etc.) in favor of the SSE, in order to cope with (and or minimize) the real problems found in the SSE *modus operandi*. In addition, with greater economic and financial sustainability, their political participation in governmental and civil society decision-making is also strengthened.

Another challenge lies in the possibility and ability to quantify and qualify such "phenomena" and developments in their respective territories. In other words, as we have seen, the evaluation and quantification of SSE projects and experiences, as well as their impacts on their respective territories, is a major challenge that must be dealt with in the 21st century. In general, at present, well-defined methodologies still need to quantify and qualify the social-territorial impacts of SSE experiences. The complexity of the phenomenon – given its economic, social, political, cultural and environmental impacts – also requires merging quantitative and qualitative methodologies. Based on this conclusion and in order to contribute to this challenge, this article presented some considerations about the construction of indicators consistent with the SSE area, as well how they relate to the SDGs.

Additionally, regarding the functionality of the indicators, the NEPESC is at present evaluating Padoka, through technical visits, survey demands, as well as technical (economic, administrative, logistic and nutritional) advice. In the context of this advice, we intend to proceed with the application of the indicators proposed in the section above (*The construction of indicators*), in an attempt to "quantify" certain aspects involving the relationship between the SSE and the SDGs mentioned. It is understood that this may only be an initial step in facing this complex challenge, which, combined with other qualitative practices (such as questionnaires

and observation of experiences in the territory), can result in quantitative and qualitative and impact assessment metrics of the consequences of SSE actions in the location studied, in compliance with the proposed SDGs.

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În Brazilia ca și în multe alte țări, economia socială și solidară (ESS) a reprezentat o alternativă inovativă pentru locuri de muncă și crearea de venituri și o soluție pentru a rezolva incluziunea socială și pe piața muncii, în ultimele două decade. Poate fi, de asemenea, considerată un model de dezvoltare nou, mai uman și mai incluziv. Acest fapt contribuie la îmbunătățirea calității vieții, atât pentru oameni și comunitățile lor, dar în special pentru cei dezavantajați social și economic. Această concluzie a determinat Organizația Națiunilor Unite să recunoască ESS ca una dintre contribuțiile auxiliare pentru îndeplinirea obiectivelor de dezvoltare sustenabilă (ODS). Acest lucru deoarece ODS integrează și unește cele trei dimensiuni ale dezvoltării teritoriale sustenabile: economică, socială și de mediu. Cu toate acestea, în prezent avem nevoie de studii și metodologii relevante, atât cantitative și calitative, pentru a măsura contribuția reală a ESS la ODS. În acest sens, articolul are ca scop să folosească o experiență inovativă și concretă a ESS municipale desfășurate într-o zonă de înaltă vulnerabilitate socioeconomică [Așezarea Monte Alegro (unde funcționează) Reforma Teritoriului] în municipalitatea braziliană Araraquara (SP). Prin acest studiu, care încă se desfășoară, se intenționează propunerea unui set de indicatori pentru ODS 1, 2, 5, 11 și 12, care vor fi folosiți în viitor, dar și în cadrul altor experimente ce țin de economia socială și solidară.

Cuvinte-cheie: economie socială și solidară; așezări; dezvoltare teritorială; ecosistem; indicatori; Agenda 2030, Brazilia.

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