



**Social Enterprise in Bolivia:  
Solidarity Economy in Context of High Informality and  
Labour Precariousness**

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## I. INTRODUCTION

The ICSEM project aims at producing a typology of social enterprises at the international level. Carrying out this task in contexts of high informality and precariousness, as is the case of Bolivia, supposes to take into account specific models of economic organization and institutional frameworks. The social and economic context of Bolivia is characterized by a large number of economic units that do not meet all the requirements of the national legislation nor have internal processes registered in business records. Similarly, the majority of the Bolivian population is employed outside the labor regulations and outside short-term (health) and long-term (retirement) social security.

This labor situation is even more striking among workers who generate their own sources of employment in small-sized economic units. These units take different organizational forms and are characterized by different types of ownership and labor relations, based on family, individual, associative and community modalities. The motivations for their creation combine income generation and the creation of spaces for sociability and members' protection, among others. In order to highlight the specific logic of these economic units, Latin American sociologists and economists have proposed the concepts of "popular" economy, understood as "a set of economic activities and social practices developed by the popular sectors in order to ensure, through the use of their own labor and available resources, the satisfaction of both material and immaterial basic needs" (Sarria Icaza and Tiriba 2009: 101, authors' translation from Spanish; see also: França Filho 2002 and Gaiger 2013).

One of the most important features of the economic fabric formed by small-sized economic units in Bolivia refers to the interaction between ethnic cleavages, gender and social class. No less important is the historical trajectory of representative organizations with a long collective memory of questioning the State and development models. The emergence of the movement of "solidarity economy" in the 1990s was established in this context of strong tradition of associativity and labor precariousness.

In the first decade of this century, Bolivia has experienced a process of social and political mobilization against the neoliberal model, which had been hegemonic during the 1980s and 1990s. This process led to the election of Evo Morales in 2006, whose government has proposed ambitious policies and institutional changes. Since that time, Bolivia has been experiencing a historic moment of legal and policy innovations in the economic field, which implied the recognition of the plural economy in the Constitution and of solidarity as a principle for regulating economic practices.

Solidarity economy organizations in Bolivia may be considered as a specific form of social enterprises according to the ICSEM definition, as they combine the production of goods and services with the primacy of "social aims", in the broad sense. Yet a precise typology of these organizations should consider their specific logic of solidarity and their political dimension. Solidarity in a context of high informality and labor precariousness means a high responsibility given to collective action at the level of workers' organization as well as a risk of self-exploitation and reproduction of socio-economic exclusion. Exclusion from the main institutions of labor regulation and social protection further confers solidarity economy with an important political dimension.

In a discussion paper entitled “Theory of the social enterprise and pluralism. The social enterprise of the solidarity type”<sup>1</sup>, Hillenkamp and Laville (2013) offer a preliminary elaboration of an ideal type of solidarity economy organizations. This paper starts from the recognition that key dimensions of social enterprise models such as they are understood in the ICSEM project reflect a dual heritage: first, the ideal-type of social enterprise developed by the EMES International Research Network, based on research conducted in several European countries since the 1990s; and secondly, EMES’ positioning in relation to research currents on the social enterprise in the United States (Dees 1998, Austin et al. 2006). Assuming the importance of advancing knowledge on different models of social enterprises internationally and based on a number of experiences of solidarity economy in different countries, the paper elaborates nine indicators of the social enterprise of the solidarity type. These include economic and social indicators reflecting the importance of the logic of solidarity, as well as indicators of the political dimension (Table 1).

**Table 1: The ideal-type of social enterprise in a solidarity economy perspective**

Indicators	Solidarity enterprise
<b>Economic</b>	Hybridization of economic principles and logic of solidarity Consistency of the economic, social and environmental commitment Valorization of work
<b>Social</b>	Objective of transformation and repair Democratic solidarity Autonomy
<b>Political</b>	Public dimension Intermediate public spaces Institutional entrepreneurship and political embeddedness

Through an interactive analysis based on case studies conducted in Bolivia between 2007 and 2011, the present paper offers a concrete discussion and illustration of these typification indicators and an operationalization into categorical variables. The paper is organized as follows: Section II further analyzes the context and concept of solidarity economy in Bolivia. Section III presents the proposed methodology for the construction of indicators and variables for the typification of solidarity enterprises. In section IV, indicators and variables are applied to a sample of solidarity enterprises in Bolivia in order to give an illustration of the achieved interactive analysis. In section V, we present our main final conclusions.

## II. CONTEXT AND CONCEPT OF SOLIDARITY ECONOMY IN BOLIVIA

### II.1. Introduction

Bolivian organizations that recognize themselves as part of the solidarity economy (economía solidaria) and fair trade (comercio justo) today have multiple origins, whose roots are to be found in the models of the indigenous community, the producers’ unions and the rural cooperatives; in urban and rural associations, which multiplied in response to adverse conditions created by structural adjustment after 1985; in social action of parishes and Catholic organizations like Caritas; and in new types of “community economy organizations” trying to combine forms of individual and collective property and of participation.

<sup>1</sup> A revised version was later published as a collective paper; see Eynaud et al. (2015).

This context can be briefly introduced focusing on two main periods: the 1990s, when so-called “associative” and peasants’ economic organizations emerged and structured in reaction to neoliberal policies; and the period that opened in the early 2000s with protest against neoliberalism, the election of Evo Morales and the assertion of a new model of “plural” economy (economía plural).

## II.2. Associative economic organizations (OECAs) and community trading in the 1990s

The 1990s correspond to a phase of structuring of old and newly created “associative economic organizations” (organizaciones económicas asociativas, or OECAs). Broadly speaking, these organizations are mostly informal, created by groups of people in the popular economy, both in rural and urban areas.

In rural communities, economic organizations are cr

1990 and then gradually reoriented towards poverty reduction (Instituto Prisma 2000; Farah 2003). The main possibility for political participation was offered at the municipal level in rural areas, but even there, the participation of OECAs in Municipal Development Plans remained limited (Vilar 2002).

One of the main difficulties encountered by the OECAs during this period was linked to commercialization. While, until the 1980s, import substitution policies had favored the domestic market, in the 1990s the market economy began to favor the international market. Exports were growing rapidly (+6.4%/year on average between 1985 and 1995) but this growth primarily benefited non-traditional exports and the hydrocarbon sector. In contrast, production not subject to international trade shrank (Jimenez 2007). These new constraints explain some important features of the OECAs during this period:

- Gradually, more and more OECAs moved from commercialization at the local or national level (model of neighborhood stores, barter and fairs) to the international level (fair trade and organic trade through Flo-Cert, IFAT and the Bolivian organic certification organization BoliCert).
- OECAs structured themselves at several levels, aiming, among other things, at bettering the conditions of commercialization. Four levels may be distinguished: first-level OECAs, consisting of producers with the same activity and in the same territory; second-level OECAs, grouping first-level OECAs at the level of a municipality, province or region and providing support for commercialization; third-level OECAs, grouping first- and second level OECAs at the national level; and fourth-level OECAs, grouping the previous levels in all sectors of activity (Betancourt 1999).

During this period, several important OECAs were created (see also the summary of the main umbrella organizations in table 2):

- 1991: Coordinating Organization for the Integration of Peasants' Economic Organizations (Coordinadora de Integración de Organizaciones Económicas Campesinas, CIOEC) and Association of Ecological Producers' Organizations of Bolivia (Asociación de Organizaciones de Productores Ecológicos de Bolivia)—both third-level OECAs.
- 1996: National Network of Community Trading (Red Nacional de Comercialización Comunitaria, or RENACC), a fourth-level OECA of which CIOEC is a founding member. At the end of the 1990s, around 210 OECAs were members of RENACC, 66% of which were rural OECAs and 34% were urban (Betancourt 1999).
- 1996: Comart Tukupaj (hereinafter ComArt), a second-level OECA in the field of handcraft "with cultural identity", which is a member of CIOEC and RENACC.
- 2002: Network of Economic Organizations of Artisanal Producers with Cultural Identity (Red de Organizaciones Económicas de Productores Artesanos con Identidad Cultural, or Red de OEPAIC), a third-level OECA.

During the 1990s, an important contact was established with the Ecuadorian foundation Maquita Cushunchic "Comercializando como Hermanos" and the Latin American Network of Community Trading (Red Latinoamericana de Comercialización Comunitaria), both created in



Quito, in 1985 and in 1991 respectively, by people close to the liberation theology (IREC 1999, p. 127). The model of community trading, echoed by RENACC in Bolivia, aimed to bring together producers and consumers from the local to the national and Latin-American levels. However, attempts to organize consumers in Bolivia, particularly through the National Coordination of Fairs (Coordinadora Nacional de Ferias), failed. Furthermore, the model of participation of producers' organizations in RENACC, based on network rather than on representation in traditional umbrella organizations, remained unclear and weak overall.

In 1999, CIOEC and ComArt withdrew from RENACC and CIOEC asserted itself as the representative body of OECAs, moving the center of gravity of the movement towards its rural and peasant component. Significantly, the acronym OECA, which first meant "Associative Economic Organization" (*Organización Económica Asociativa*), came to mean "Peasants Economic Organization" (*Organización Económica Campesina*). Under the name of "Coordinating Organization for the Integration of Peasants' Economic Organizations", CIOEC participated in 2000 in the National Dialogue that brought together civil society organizations and the government to design the national policy for poverty reduction, and in 2002 in the March of Peasant and Indigenous Movements for the Constituent Assembly. During these years, the activity of RENACC in the Andean region stopped. In Tarija and Santa Cruz, in the south and east of the country, RENACC developed local activities of commercialization support, and it led the National School in Leadership Training and Community Trading in Santa Cruz (Betancourt 1999).

### II.3. Solidarity economy in the "process of change" since 2006

From 2003 to 2006, the rise of Evo Morales' party, the Movement Toward Socialism (Movimiento al Socialismo, o MAS), opened an important moment of political transition. In this context, RENACC was reactivated, and both RENACC and CIOEC positioned themselves as political actors. At the same time, the concept of community trading was gradually replaced by those of solidarity economy and fair trade. In 2005, RENACC, with the help of the Canadian NGO CECI (Centre for International Studies and Cooperation), organized an international meeting that endorsed the use of a new terminology: the meeting was indeed entitled "Solidarity Economy and Fair Trade Entrepreneurship Meeting" (*Encuentro Empresarial de Economía Solidaria Comercio Justo*). The final statement of this meeting, after criticizing neoliberalism, states that:

**Así se logran combinar el comercio y el trabajo para un nuevo modelo de sociedad y política en el que la economía está al servicio de la gente, como lo estamos haciendo desde el comercio justo y como lo estamos haciendo en los mercados locales.**

(Declaración final del Encuentro Empresarial de Economía Solidaria Comercio Justo en Murguía, Cochabamba, September 15<sup>th</sup>, 2005, authors' translation from Spanish).

This semantic change came from various influences, including the World Social Forums (the first of which had taken place in Porto Alegre, in Brazil, in 2001), where solidarity economy is displayed as an alternative development model, and as the political and cultural affirmation of indigenous peoples in Bolivia, where solidarity is presented as an autochthonous value, in opposition to individualism associated to the neoliberal model. It marked a radicalization of the critique of neoliberalism, without departing from a pragmatic posture. Thus, the claim for fair trade, which is almost always associated in Bolivia to solidarity economy, oscillated

between challenging the international trade order and simply attempting to access market opportunities, at the local level through specialized shops or at the international level through FLO and IFAT or other channels.

When Evo Morales came to power, in 2006, the radical trend was first strengthened, and CIOEC and RENACC both confirmed their position as political actors. The government's discourse condemned neoliberalism as a continuation of colonialism and displayed a model of plural economy, in which the indigenous community, and its inferred values of solidarity, would play an important role. In August 2006, a Constituent Assembly was set up; this represented, in the eyes of CIOEC and RENACC, a historic opportunity to position the solidarity economy in the Bolivian Constitution and state policies. These two organizations held a series of consultations with their members to elaborate proposals; in 2007, RENACC set up the Permanent Multi-sector Platform for Solidarity Economy and Fair Trade in Bolivia (Plataforma Multisectorial Permanente de Economía Solidaria y Comercio Justo en Bolivia, hereinafter "the Platform"). However, the Platform failed to overcome disputes between RENACC and CIOEC, and ultimately CIOEC and the Platform sent their proposals to the Constituent separately. The main proposals were, respectively, the recognition of collective ownership in OECAs and the definition of a specific tax system and social insurance for OECAs (CIOEC 2006 and 2007); and the creation of a national fair trade certification, of a system of social finance and of a governmental institution in charge of solidarity economy and fair trade (Plataforma Multisectorial Permanente de Economía Solidaria y Comercio Justo en Bolivia 2007).

However, the distance existing between the government policy and the solidarity economy began to appear gradually. The government policy focused on the creation of public enterprises in sectors considered as strategic, in particular the production of food and basic commodities. These new public enterprises generally did not meet the objectives of solidarity economy organizations and they could even destroy existing forms of collective action at the local level (Ruesgas 2014). On the other hand, the government's maximalist conception of the indigenous community as the depository of solidarity and of community economy as a bulwark against the excesses of neoliberalism did not match Bolivian reality (Wanderley 2013). Indeed, the plural economy should be understood as the interweaving of different logics in all institutions and not as a separate sector of the economy that would conform to a single principle (Hillenkamp 2009). Communities, in particular, cannot be regarded as guided only by reciprocity and redistribution, referring to Karl Polanyi's principles based on symmetry and centrality (2001, 1992), when the penetration of market logics actually dates back to the colonial period (Harris 1983) and when property rights and uses generally balance individual and collective interests. Ignoring these realities hinders policy implementation and may explain why the achievements of Evo Morales' government in this field since 2006 were ultimately more symbolic than effective (Wanderley 2013).

The new Constitution, approved in 2009, recognizes four forms of organization that make up the plural economy: community; state; private; and social cooperative economy (Article 306, III). Yet the solidarity economy is not clearly positioned in relation to the "community economy" and the "social cooperative economy". OECAs, associations and organizations of artisans and small urban producers are also recognized in the Constitution as "solidarity and reciprocal alternatives". As such, they may, in particular, benefit from preferences in public procurement (Article 334, 1 and 4).

In 2010, the appointment of the leader of a well-known second-level handicraft organization (Asociación Artesanal Hse4or de Ma ol) and founder of RENACC, Antonia Rodríguez, as Minister of Productive Development and Plural Economy sparked hope for political action in favor of the solidarity economy. However, she had to resign after one year in office and the Pluri-national Strategy for the Solidarity Economy and Fair Trade (Estrategia Plurinacional de Economía Solidaria Comercio E\$sto), approved while she was Minister (ministerial resolution n° 293.2010), has not been implemented by her successor until now. In 2012 and 2013, two sector-specific laws were passed: law n° 306 for the Promotion and Development of Artisans and law no. 338 for Indigenous, Autochthonous, Peasants' Economic Organizations (OECAs) and Community Economic Organizations (OECOMs) for the Integration of Sustainable Family Farming and Food Sovereignty. Both laws announced sector-specific promotion measures, but did not include the demands for specific tax system and social insurance developed by the OEPAIC Network and CIOEC. In the case of law no. 338, the designation of the OECOMs as subject of the law appears to be ill-defined and has raised dispute between social actors, which tends to hinder the application of the law.

Finally, the government's discourse upholding the indigenous values and ways of organization may obscure an economic model which is actually dominated by a new form of state capitalism in which the solidarity economy occupies a rather marginal place. Ultimately, the difficulty of the solidarity economy to develop into a political subject persists.

In 2009, the Platform and CIOEC finally managed to unite to form the Movement for Solidarity Economy and Fair Trade in Bolivia (MESyCJ), gathering the main umbrella organizations. However, management difficulties, whose origins are numerous—lack of in-depth data on member organizations and therefore failure of the MESyCJ's board to meet the members' expectations; lack of professional management and, in particular, lack of time of board members; tense social relations within the Movement and within the board between representatives of producers' organizations and those of support organizations—weakened this organization. In 2012, a new National Coordination of Fair Trade (Coordinadora Nacional de Comercio E\$sto, CNCJ-B) was established, with the aim of representing small producers' organizations at the national level, of generating discussion spaces and of strengthening the integration and exchange between organizations of small producers at the national level and in Latin America and the Caribbean. The CNCJ-B brings together big organizations such as the National Association of Quinoa Producers (Asociación Nacional de Productores de Quinoa), the Association of Coffee Growers of Taipiplaya (Asociación de Caficultores de Taipiplaya), the Union of Agricultural Cooperatives "Operation Earth" (Central de Cooperativas Agroecológicas A-eraci9n #ierra), the Union of Cocoa Producers' Cooperatives "El Ceibo", the Federation of Export Coffee Growers of Bolivia (Federación de Caficultores Exportadores de Bolivia) and the Network of Economic Organizations of Artisanal Producers with Cultural Identity (Red de AEP3IC), which have direct access to the political space. The relationship between Bolivian solidarity economy organizations and the government remains fragmented, tending to operate through direct and sometimes personal relations rather than through the construction of public spaces, which tends to limit their democratic legitimacy and political impact.

Table 2: Main umbrella organizations related to the solidarity economy in Bolivia

ACRONYM	YEAR OF CREATION	FULL NAME	DESCRIPTION
CIOEC	1991	Coordinating Organization for the Integration of Peasants' Economic Organizations (Coordinadora de Integración de Organizaciones Económicas Campesinas)	3 <sup>rd</sup> level OECA National level Agriculture and handcraft
RENACC	1996	National Network of Community Trading (Red Nacional de Comercialización Comunitaria)	4 <sup>th</sup> level OECA Multi-sector
ComArt	1996	Community of artisans "Tukuypaj" (Comunidad de artesanos Tukuypaj)	2 <sup>nd</sup> level OECA Handcraft
Red de OEPAIC	2002	Network of Economic Organizations of Artisanal Producers with Cultural Identity (Red de Organizaciones Económicas de Productores Artesanos con Identidad Cultural)	3 <sup>rd</sup> level OECA Handcraft
The Platform	2007	Permanent Multi-sector Platform for Solidarity Economy and Fair Trade in Bolivia (Plataforma Multisectorial Permanente de Economía Solidaria Comercio Justo en Bolivia)	4 <sup>th</sup> level organization Multi-sector
MESyCJ	2009	Movement for Solidarity Economy and Fair Trade in Bolivia (Movimiento de Economía Solidaria Comercio Justo en Bolivia)	4 <sup>th</sup> level organization Multi-sector
CNCJ-B	2012	National Coordination of Fair Trade (Coordinadora Nacional de Comercio Justo)	4 <sup>th</sup> level organization Multi-sector

### III. TOWARDS A TYPOLOGY TOOL: METHODOLOGICAL PROPOSAL BASED ON THE BOLIVIAN CASE

Two methodological questions emerge from the observation of the significant peculiarities of the historical processes of solidarity economy building in Bolivia. The first refers to the steps necessary to build indicators able to capture the specificities of solidarity enterprises, valid in different contexts. The second question concerns the capacity of survey methods to capture significant aspects of this reality that can be replicated in different historical contexts.

Building on its analysis of the Bolivian context, this paper aims at consolidating typification indicators for solidarity enterprises valid in contexts of high informality and labor precariousness. To do so, the study starts from qualitative research on organizations of the associative kind participating in the solidarity economy in Bolivia (Wanderley 2004 and 2009; Hillenkamp 2009 and 2012). In-depth interviews and participant observation in meetings and activities promoted by the organizations were the methods used to construct dense qualitative information on these organizations.

In light of these studies and of the questionnaire proposed in the ICSEM Project and initially discussed by Hillenkamp and Laville (2013), the present paper proposes questions that guide the definition of indicators and variables for mapping first-level solidarity economic organizations in contexts of high informality and labor precariousness.

The organizations studied are characterized by three main features: (i) they are first-level economic organizations, engaged directly in the production of goods or services; (ii) they are collective economic organizations, as opposed to individual economic units; and (iii) they are collective organizations whose membership is voluntary; therefore, they are organizations of the collective and associative kind, as opposed to the collective and community kind, based on affiliation through assigned status.

This third criteria is important in Bolivia due to the fact that the new Constitution and legislation recognize and promote a type of economic organization based on compulsory membership in a territory (namely "community economic organization", or OECOM) (Wanderley 2013; see also above, in part II.2, the distinction between associative economic organizations (OECAs) and communal governments based on compulsory affiliation in a territory).

**Table 3: Indicators for the delimitation of the universe of study**

Indicators	Definition	Criteria for operationalization into a variable	Categorical variable
<b>First-level economic organization</b>	Grassroots organization for the production of goods or services	Some form of organization of individuals or families (as opposed to legal persons) who have some characteristic of production or some territory in common	1. First-level organization 0. Second-, third- or fourth-level organization
<b>Collective organization</b>	Organization under a collective mode of management and decision-making	Existence of a mode of representation and/or participation of all the members of the organization in making key decisions	1. Collective 0. Individual or private
<b>Voluntary membership</b>	Membership depending on individual or family decision, not automatically derived from membership in another group	Membership is not determined by membership in a territory (community), union or other organization or territorial organic society	1. Voluntary membership 0. Compulsory membership

It must be further noted that the organizations in this first study were mostly selected in urban contexts but that the boundaries between urban and rural territories are diffuse in the Andean area, due to the continuity of social and economic relations of individuals in their rural communities of origin and new urban context. The double residence, sandwiched seasonal activities in both spaces, labor and spatial diversification characterize migration in this region. Therefore the study of urban activities also allows a first approach to rural economic organization's associative logic and the exploration of the relevance of indicators and variables of activities settled in rural areas.

### III. 1. Methodological proposal

Despite the significant heterogeneity of the universe of study in sociological and economic terms, previous qualitative studies had found some regularities in interactions based on two indicators: the sex of the members and the degree of economic consolidation of the organization. For this reason, we adopted these indicators as variables to diversify the sample in order to analyze changes in typification indicators of solidarity enterprises. Our method consisted of developing these indicators iteratively, based on the confrontation with a number of diversified case studies.

The first indicator of diversification (sex of members) resulted in three categories—organizations of women, organizations of men and organizations with mixed membership (men and women). Significant differences were observed in the division of productive and reproductive labor and socio-economic dynamics in terms of internal social gender roles when we controlled for this indicator. The sexual homogeneity of the members of the organizations seems to neutralize the traditional gender division in the internal dynamics of the organization, although this does not transform the division of labor in the members' households. The sexual composition of the organizations has a strong correlation with differences in terms of priority objectives, organizational principles of interactions, performance and distribution. In contrast, mixed organizations formed by men and women impose specific organizational dilemmas that are not present in homogeneous organizations.

The second indicator of diversification (degree of economic consolidation) derived in three variables—advanced, intermediate and low level of consolidation. We define economic consolidation in terms of "market positioning", which is measurable by the level of sales in relation to the production capacity; we analyzed the extent to which the income margins were sufficient to ensure both the continuity of the economic activity and the relative satisfaction of consumption needs (in goods and services) of the organization's members and their families. We considered that the generation of cash income is one of the objectives of the members and workers of solidarity economy organizations. This goal is complemented by other social and political objectives. Concern for economic consolidation, understood as the continuity of economic activity through the sale of goods or services, was present in all the associations studied, although its relevance depended on the combination with other criteria.

The three categories based on the degree of economic consolidation were defined as follow: (i) organizations with advanced level of economic consolidation, in which sales exceeded the production capacity and, therefore, production was continuous or any interruption in the three years preceding the study was not due to lack of sales; (ii) organizations with intermediate level of economic consolidation, where sales met the production capacity so that the production activity was not interrupted more than 50% of the time during the three years

preceding the study; and (iii) organizations with low level of economic consolidation, where sales were lower than the production capacity, causing interruption of production for more than 50% of the time during the three years preceding the study.

**Table 4: Heuristic indicators for the construction of the sample**

Heuristic indicators	Definition	Criteria for operationalization into a variable	Categorical variable
<b>Composition by sex</b>	Organization made up of women, of men or with mixed membership	1. Female members 2. Male members 3. Male and female members	1. Women's organization 2. Men's organization 3. Mixed organization
<b>Level of economic consolidation</b>	Relationship between the level of sales and the production capacity of the organization in the three years preceding the study	The organization may have a level of sales higher, equal or below its production capacity in the three years preceding the study; such situations relate to the continuity or discontinuity of production	1. Advanced economic consolidation 2. Intermediate economic consolidation 3. Low economic consolidation

These two indicators became our diversification variables, determining a two-way table with nine fields.

In this paper, we focused on the four main scenarios in which most of our case studies were concentrated: that of women and mixed organization with intermediate or low level of economic consolidation. Hence, we used a simplified version of the table, consisting of two entrances and four fields.

### III.2. Typification indicators and variables: a proposal

Based on a double-entry table (composition by sex and level of economic consolidation), we analyze (in Part IV of the present paper) qualitative data from eight cases. It is important to note that at this stage we did not expect to find homogeneous types of organizations in each of these four categories. The number of cases is obviously insufficient to assume any regularity and, what is more, we do not claim to control all other variables within these categories. Our objective was simply to consolidate the definition and operationalization of the typification indicators based on the exploration of certain variations that we already knew (composition by sex and level of economic consolidation) and on others that we did not control for the moment.

This process allowed us to iteratively construct the typification indicators and variables and the result of this exploratory exercise is the following proposal:

- Economic dimension of the organization (specific features of the organization of production and exchange and of labor relations):
  1. Importance of the principle of reciprocity in the production process;
  2. Valorization of work;
  3. Hybridization and coherence between economic, social, environmental and political objectives.
- Social dimension of the organization (social relations that underpin the organization's economic activity, both internally and externally):
  4. Aim of social transformation, beyond income generation;
  5. Internal democratic solidarity—self-organization;
  6. External democratic solidarity—autonomy.
- Political dimension of the organization (oriented toward institutional change, within the normative horizon of democratizing the economy):
  7. Public dimension;
  8. Participation in intermediary public spaces for institutional entrepreneurship;
  9. Importance of the common good and of democracy in the understanding of political participation.

It is important to underline that these nine dimensions and the corresponding indicators detailed below were identified for the sake of building a typology of first-level organizations. Nevertheless, they do not aim at giving a full characterization of these organizations, nor do they rest on a comprehensive understanding of the economic, social and political order of the solidarity economy.

In order to give a more complete characterization of these organizations, a series of complementary data were collected. In addition to general information (such as name, location and sector of activity), this included specific data on: who took the initiative of the organization and with which objective(s); the organization's degree of formality; the composition and identification of the organization's memberships by ethnicity and social class; the education level of the workers; the perception of income generated through the organization (enough to live or not); the type of markets, customers and the perception of the position in the market; the characteristics of the locale; production diversification; sources of financing; and type of property. In a further stage of the investigation, the correlation between the typification indicators for the construction of valid typologies in contexts of informality and labor precariousness should be explored.

Furthermore, the connection between the micro level of the organizations and the macro level of the economic dynamics system requires the inclusion of other dimensions, such as the interactions among economic organizations and between these and other actors and institutions in their environment. These dimensions also incorporate degrees of cooperation, collective action and solidarity that are equally important to understand the characteristics and challenges of the solidarity economy.

Having made these observations, we can proceed with this first exploratory phase of the research. The nine indicators are operationalized in categorical variables (0, 0.5 or 1), as shown in Table 5. In this table, we explain the indicators, their definitions, the criteria for constructing variables from these indicators (operationalization) and the definition of the categorical variables.



**Table 5: Typification indicators and categorical variables of solidarity enterprises in context of high informality and labor precariousness**

Typification indicators	Definition	Criteria for operationalization (construction of variable)	Categorical variable
<b>Economic indicators</b>			
<b>1. Importance of the principle of reciprocity in the production process</b>	Presence of the principle of reciprocity (understood as type of interdependence based on complementarity built with a vision of the common good and between elements which may be different) in the way of organizing the production	Workers need each other in the production process because the organizational model foresees that material (raw materials, equipment, locale or workshop, etc.) or immaterial (different kinds of knowledge) resources are shared	1 - Existence of both types of complementarity (material and immaterial) with vision of the common good 0.5 - Existence of a single type of complementarity (material or immaterial) with vision of the common good 0 - Absence of any kind of complementarity or vision of the common good
<b>2. Valorisation of work</b>	Priority to the valorization of work for the satisfaction of material and immaterial basic needs of the organization's members and their families and communities, rather than private capital accumulation by a few individuals	. Members are workers and the majority (over 50%) of workers are members . There are shared criteria (written or unwritten) limiting the distribution of profits according to the capital invested by the members	1 - Compliance with both criteria 0.5 - Compliance with only one of the two criteria 0 - No compliance with any of the two criteria
<b>3. Hybridization and coherence between economic, social, environmental and political objectives</b>	Coherence between economic, social, environmental and political objectives in all types of actions of the organization	Implementation of coherent social, environmental and/or political criteria in decision-making and operation (input supply, financing, production, marketing, distribution of surplus)	1 - Implementation of social, environmental or political criteria in decision making and operation in 70% to 100% of the economic process 0.5 - Implementation of the criteria in between 30% and 70% of the economic process 0 - Low implementation (in less than 30% of the economic process)

Social indicators			
<b>4. Aim of social transformation, beyond income generation</b>	The organization aims at a structural transformation of the political, economic or social order with a vision of the common good	Explicit visions of changing political, economic and/or social structures in the medium and long term, articulated at the discursive level (references to democratic rights and the common good beyond the immediate and pragmatic interests of the organization's members)	1 - Presentation of an elaborated proposal (or a proposal under elaboration) of transformation of the political, economic or social order oriented toward the common good 0.5 - Mention of at least one goal of transforming the political, economic or social order oriented toward the common good 0 - No objectives of transforming the political, economic and social order mentioned
<b>5. Internal democratic solidarity—self-organization</b>	Solidarity is based on horizontal (egalitarian) social relations and empowerment of members of the organization	. Active participation of the members in defining the mission of the organization and the means to achieve it . Sharing of strategic knowledge (on customers, suppliers, umbrella organizations, networks, decision-making criteria, etc.) among most members	1. There exist mechanisms and institutionalized spaces of deliberation and participation of members on important issues related to the organization's mission and the means to achieve it, and knowledge of at least 70% of the strategic elements of the organization is shared among at least 70% of the members 0.5 - Only one of these two criteria met 0 - None of these two criteria met
<b>6. External democratic solidarity—autonomy</b>	Solidarity is based on em-owerment and horizontal (egalitarian) social relations of the organization with other organizations in its environment	The organization manages to get the financial, technical and commercialization support it considers necessary to operate and it manages the associated relationships and practices in a way that favors its own autonomy and the autonomy of its members	1 - There exist mechanisms and spaces for deliberation and participation for over 70% to 100% of the objectives, methods and expected results of the ongoing financial, technical and commercialization support with a horizon of emancipation of the organization from its support; or absence of external support as a result of the organization's choice. 0.5 - Mechanisms and spaces for deliberation and participation on 30% to 70% of the objectives, methods and expected results of ongoing support. 0 - Few (less than 30%) mechanisms and spaces for deliberation and participation on the objectives, means and results of ongoing support (on the contrary, these are defined without the participation of the organization's members); or no external support while it is deemed necessary.

Political indicators			
<b>7. Public dimension</b>	The organization understands that its role is not restricted to income generation, but also includes a role in public issues. This understanding is reinforced through the promotion of or participation in public spaces in which deliberative processes take place to (re-)define shared interests and values.	Participation in deliberative spaces that include actors outside the organization to discuss common problems and to make decisions	1 - Existence, in the year prior to survey, of an initiative to build public spaces or of regular participation (more than once) in public spaces to discuss and deliberate on common issues beyond the organization itself. 0.5. Existence, in the year prior to survey, of one single experience of participation in public spaces to discuss and deliberate on common issues beyond the organization itself. 0 - No initiative or participation in public spaces for discussion or deliberation on common issues.
<b>8. Institutional entrepreneurship</b>	Participation in networks of representation and intermediation with public authorities for institutional entrepreneurship	Membership in networks and organizations of political intermediation or participation in discussion with public authorities for institutional entrepreneurship	1 - Membership and participation in intermediate organizations and/or collective initiatives and/or discussion spaces with public authorities for institutional entrepreneurship (changes in the institutional framework and public policy) 0.5 - Only membership (without active participation) in intermediate organizations and/or collective initiatives and no participation in discussions with public authorities 0 - No membership or participation in intermediate organizations or collective initiatives or opportunities for discussion with public authorities
<b>9. Importance of the common good and of democracy in the understanding of political participation</b>	The understanding of participation in public spaces is based on the common good, as opposed to private goods or monopolies, and on the respect of democratic principles	The principles guiding political participation (or its understanding) and collective actions are: (i) vision beyond the organization's own interests; (ii) respect for the institutional framework defined by the Constitution and its legal apparatus; (iii) respect for institutionalized spaces of participation of different actors; (iv) respect for the agreed rules of deliberation, even when the results are not as expected	1 - Presence of common good and democracy criteria in the understanding of political participation 0.5 - Mix between, on the one hand, common good and democratic criteria and, on the other hand, private or corporate goals in the understanding of political participation 0 - Neither democratic nor common good criteria in the understanding of political participation

## IV. CASE STUDIES

In the following, we show eight case studies that have been used to develop the nine typification indicators presented in Part III. Our main goal was to use our previous qualitative data to refine and adjust iteratively these indicators. Hence, the case studies are presented here to illustrate how the indicators can be applied to differentiate between certain key dimensions of solidarity enterprises. While some lessons (correlations, clusters) may appear from the study of these eight cases, they should be considered only as assumptions, given the small number of cases and since they are only a secondary result of our analysis.

The eight organizations were selected according to the two control variables identified in Part III, namely the composition by sex and the level of economic consolidation. As already mentioned, we focused on the four categories to which, according to previous data, most organizations belonged: women's organizations with a low level of economic consolidation; women's organizations with an intermediary level of economic consolidation; mixed organizations with a low level of economic consolidation; and mixed organizations with an intermediary level of economic consolidation. We considered varying these two parameters as a way to test the nine indicators by submitting them to different "scenarios". Thus, the main criterion for building our sample was diversification within the universe of work previously defined. In addition, we had to take into account the possibility, among the existing data, to qualify the nine indicators, as well as the basic indicators and the largest possible number of additional indicators.

Data came from field studies conducted in 2007 (Yatiñasa, Wiphala, AIQ San Antonio, Corrigiendo Huellas and Suma Pancara) and 2010-11 (Las Gregorias, Warmi Ajayu, Sartasipxañani); data on Suma Pancara was updated in March 2014. The case studies are presented according to a common schema that includes: (1) the general profile of the organization, which summarizes the basic data and additional indicators; (2) a table of the nine typification indicators according to the criteria presented in Part III.

### IV.1. Women's organization with low level of economic consolidation

#### IV.1.1. Suma Pancara

##### *General information*

Suma Pancara is a knitting and weaving cooperative of 34 women in the city of El Alto. It was created in 1986 with the aim of complementing the incomes of the members' husbands. The members describe themselves as artisans belonging to the local middle class, without a marked ethnic identity. Most of them have a low educational level (some degree of primary school). Today, most of them are elderly women without the possibility of retirement (no public or private pension).

During the 1980s and 1990s, Suma Pancara received support from several institutions for technical and administrative training and for buying the cooperative's building and equipment. It then remained inactive during a 12-year period (1998-2010) due to lack of sales and motivation. It was only in 2010 that Suma Pancara became active again, thanks to the support provided by a well-established local NGO dedicated to the empowerment of indigenous women (Centro de Promoción de la Mujer Gregoria Saca, or CPMGA).

Currently, Suma Pancara's main products are woven and machine-made alpaca clothes, which are sold through Mama Rawa, CPMGA's local shop in La Paz (55% of sales, representing 10,000 BOB—i.e. around 1,040 euros—in 2013) and through local fairs (45% of sales, about three fairs per year). Members work at home and meet at the cooperative once a week. Collective expenses are covered by a fix percentage of sales (5%) and by the rent of cooperative rooms used as lodging.

However, sales remain insufficient and about 50% of the women participate in the cooperative only as a secondary activity, in complement to informal trading and/or agriculture. In addition, the members' age and increasing need to retire has induced disputes about the cooperative's future. While some want to keep the cooperative working, other want to sell it to use the capital as an individual pension or to re-invest into a new institution where younger women would be producing and they could themselves work as teachers. As a consequence, trust within the cooperative is fairly limited and it is no longer open to new members.

### *Typification indicators*

<b>Economic indicators</b>	<b>Characteristics</b>	<b>Var.</b>
<b>Importance of the principle of reciprocity in the production process</b>	Suma Pancara has been designed according to a model of reciprocity and this logic of interdependence remains significant, even if today the vision of common good is largely missing. . Members share the cooperative's building and equipment as well as raw material but mostly work at home. . It is not clear to which extent each member produces her own products independently or must conform to common models of the organization (which would mean interdependence through shared knowledge).	0.5
<b>Valorization of work</b>	. All members work either in production (~70%) or in administration (~30%) and all workers are members. . Income is a function of individual sales (although the cooperative building [= capital] is rented). It must be noted that this model will radically change if the cooperative is transformed into a training institution for younger women. The form (private or "social") of this institution is not clear but there exists the possibility of a mixed model based on work and capital valorization, where the current cooperative's members would work as teachers and "sell" access to their equipment.	1
<b>Hybridization and coherence between economic, social, environmental and political objectives</b>	The urgent need to generate an income, combined with the weakening of personal ties and of social vision within the organization, determines that decisions are taken almost exclusively according to economic criteria. . Raw material is bought according to market conditions (price and quality). . The type of production (models) is determined by the marketing possibilities (orders and sales). . Direct sales are preferred to sales through ComArt to avoid the 8% discount at ComArt.	0

<b>Social indicators</b>		
<b>Aim of social transformation, beyond income generation</b>	Women mention the fact of being able to get out of their house and get access to a space of practical learning as a social benefit, but the link to enhancing autonomy or enabling emancipation is very weak. No other objective of social transformation is mentioned.	0
<b>Internal democratic solidarity—self-organization</b>	. The organization's governance relies on a board (4 people elected for 3 years) and on several specialized commissions, in which most members participate at some point. Decisions are taken by vote at the board level or at the General Assembly level. . In addition, the group meets every week for coordination so we can assume that strategic knowledge is fairly shared.	1
<b>External democratic solidarity—autonomy</b>	Support by CPMGA has been in line with Suma Pancara's objective to get access to fair trade and is recognized as the main positive factor for its "reactivation" since 2010. At the same time, CPMGA is perceived as a supervising entity and the president of Suma Pancara expresses her wish to become fully independent through self-management and setting up their own shop.	0,5
<b>Political indicators</b>		
<b>Public dimension</b>	There is no understanding of the organization's role beyond income generation and no participation in public spaces.	0
<b>Participation in intermediary public spaces for institutional entrepreneurship</b>	There is no understanding of the organization's role beyond income generation and no participation in political networks nor contact with authorities.	0
<b>Importance of the common good and of democracy in the understanding of political participation</b>	There is no vision of political participation.	0

#### IV.1.2. Las Gregorias

##### *General information*

Las Gregorias is a small informal group of 11 women in districts 5 and 6 of the city of El Alto producing alpaca clothes. Members are migrant Aymara women from the Altiplano with an overall low level of education (generally primary school, in some cases secondary).

The group appeared in 1993 following an "integral" training provided by CPMGA (Centro de Promoción de la Mujer Gregoria 3-a) and was supported by this institution during its first five years (local, equipment, raw material and commercialization were provided by CPMGA). In 1997, Las Gregorias became a founding member of ComArt and in 1998, it was created as an autonomous group of 35 women with its own workshop and equipment. Funding (used to buy knitting machines) was provided by the members' contributions, the organization's surplus and a United States foundation. Many women left the group during this period.

Las Gregorias' members mostly work at the organization's workshop, although some members own their own weaving loom at home. Children are permitted at the workshop and members organize to look after them. The group meets for coordination and discussion once a week. The main products are hand-woven alpaca clothes, although the group also offers machine-knitted clothes. Sales are performed almost exclusively through ComArt (local shops and exportation orders). Las Gregorias does not take part into any local fair, although members may sell a small share of their production through personal relations. In the year of

survey, sales at ComArt amounted 95,835 BOB (around 10,000 euros) but were irregular and overall insufficient. Production was regularly stopped for lack of sales and liquidity for buying raw material, and members had complementary activities (informal trade and agriculture).

### *Typification indicators*

<b>Economic indicators</b>	<b>Characteristics</b>	<b>Var.</b>
<b>Importance of the principle of reciprocity in the production process</b>	<ul style="list-style-type: none"> <li>. Las Gregorias' members share raw material, equipment and a locale, which have been funded by individual contributions, the group's profits and external funding.</li> <li>. They also share technical knowledge for producing common models for export.</li> </ul>	1
<b>Valorization of work</b>	<ul style="list-style-type: none"> <li>. All workers are members and all members are workers.</li> <li>. Income is defined according to sales of products sold at ComArt shops and according to work (number of pieces) for export.</li> </ul>	1
<b>Hybridization and coherence between economic, social, environmental and political objectives</b>	<p>The following decisions/practices are guided by the objective of increasing income:</p> <ul style="list-style-type: none"> <li>. supply (where to buy);</li> <li>. type of production (which products);</li> <li>. commercialization (level of price).</li> </ul> <p>The following decisions / practices are guided by social criteria:</p> <ul style="list-style-type: none"> <li>. distribution of work (equity: give work to those who most need it);</li> <li>. organization of production (collective);</li> <li>. funding (collective with external support).</li> </ul>	0.5
<b>Social indicators</b>		
<b>Aim of social transformation, beyond income generation</b>	The group acts as a space favoring women's autonomy through learning and income generation but there is no sign that this would translate into a vision of social transformation.	0
<b>Internal democratic solidarity—self-organization</b>	<ul style="list-style-type: none"> <li>. Important decisions relating to the organization's mission and strategy are made by the General Assembly.</li> <li>. Operational decisions are made by the board (4 people elected for one year according to seniority and rotation), so it can be assumed that strategic knowledge is fairly shared among members.</li> </ul>	1
<b>External democratic solidarity—autonomy</b>	<ul style="list-style-type: none"> <li>. The organization has progressively emancipated from CPMGA and now only receives strategic information (fair trade sales, solidarity economic networks and lobbying) from this institution.</li> <li>. The organization receives support from ComArt for local and international commercialization. It is affiliated to this institution, is part of its board and considers it a transparent organization.</li> </ul>	1
<b>Political indicators</b>		
<b>Public dimension</b>	The organization participates in ComArt's Assembly, where artisans' common issues are discussed (in particular the creation of a social insurance scheme).	0.5
<b>Participation in intermediary public spaces for institutional entrepreneurship</b>	The organization participates in intermediary organizations (ComArt and Red de OEPAIC, on the one hand, and RENACC La Paz, on the other hand) in relation with political demands (respectively, a social insurance scheme for the artisans, and political representation of solidarity economy and fair trade organizations), but it does not directly participate in institutional entrepreneurship.	0.5
<b>Importance of the common good and of democracy in the understanding of political participation</b>	<p>Political participation is understood through two main issues:</p> <ul style="list-style-type: none"> <li>. creation of a social insurance scheme for the artisans, considered as a measure of social justice coherent with the Bolivian Constitution;</li> <li>. access to markets (private or at least corporative demand).</li> </ul>	0.5

## IV.2. Women's organizations with intermediate level of economic consolidation

### IV.2.1. Warmi Ajayu

#### *General information*

Warmi Ajayu is a limited liability company composed of six women of Villa Adela, in district 3 of the city of El Alto. From the 1990s until 2004, these women were part of another knitting association, from which they then exited, denouncing ill treatment and unfair payment. In 2004, they founded their own weaving and sewing organization. The decision to create a limited liability company rather than an association was justified by a lawyer's recommendation. The women have an intermediate level of education and two of them (including the manager) are sisters. Members' children helping at the organization have technical and administrative degrees.

Warmi Ajayu has an extensive workshop with sewing machines and weaving looms in the house of the manager. Funding has been provided by individual loans of the manager and her family. All members, their adult children, and other relatives, as well as other workers from the area work there. Since 2007, Warmi Ajayu has benefited from support from Caritas for training and export to fair trade clients in Spain. In addition, it receives orders from another client in the United States (outside fair trade), which provides work for around 50 additional workers during three months of the year (May-July). The average income of these workers during these three months is 1,200 BOB/month (around 125 € by the time of survey). The rest of the year, only the members and their relatives get work.

#### *Typification indicators*

Economic indicators	Characteristics	Var.
<b>Importance of the principle of reciprocity in the production process</b>	The dominant relation is dependence of the workers on the organization's management, since all equipment and the workshop belong to the organization and work is divided in several specialized tasks (workers do not have knowledge of the entire production process). Furthermore, the manager considers transferring the workshop from the city of El Alto to her rural community, where real estate prices are lower, which would mean abandoning the current workers and hiring new ones.	0
<b>Valorization of work</b>	. Only 6 people are members of the organization (limited liability company); all other workers (up to 50 during 3 months of the year) are not members. . There is no explicit limitation on capital remuneration (although work remuneration is established by a pay scale which has been discussed with the workers and is considered to be significantly higher than usual incomes in El Alto).	0



<b>Hybridization and coherence between economic, social, environmental and political objectives</b>	The organization's objectives can be described as 1) securing incomes for the organization's members and 2) helping other people by creating opportunities for work. The second objective can be considered as "social" although it points to relations of protection and domination rather than solidarity. The following decisions/practices are driven by both "economic" and "social" criteria: . Funding: members' collective or individual loans for the benefit of members and workers. . Type of production: according to orders and trying to diversify production to avoid seasonality. . Commercialization: trying to expand sales for the benefit of members and workers. The following decisions / practices are mainly driven by the sole economic criterion: . Distribution of profit: to organization's members. . Organization of production: specialization (workers do not control the process of production). . Distribution of work: first to members, then to other workers.	0.5
<b>Social indicators</b>		
<b>Aim of social transformation, beyond income generation</b>	No sign of a vision of social transformation.	0
<b>Internal democratic solidarity—self-organization</b>	. Although the organization's manager played a leading role in the definition of the mission and organizational form, the other 5 members participate in discussions and decision making on strategic matters. . Strategic knowledge is shared by the organization's members (but not by the workers).	1
<b>External democratic solidarity—autonomy</b>	The organization receives support from Caritas for training (management, fair trade and gender equity) and commercialization (fair trade export to Spain). Support has been in line with the organization's objectives and has led to autonomy (in particular: two new clients, although not in fair trade).	1
<b>Political indicators</b>		
<b>Public dimension</b>	The organization understands that its role is to help other people make an income, but it does not participate in any public space.	0
<b>Participation in intermediary public spaces for institutional entrepreneurship</b>	No vision of institutional entrepreneurship or participation in any intermediate organization or collective action.	0
<b>Importance of the common good and of democracy in the understanding of political participation</b>	No vision of political participation.	0

## IV.2.2. Sartasipxañani

### General information

Sartasipxañani is an informal group of around 14 women located in the neighborhood of Alto Lima in district 6 of El Alto. It produces shoes and other decorative objects made out of felt.

Members are Aymara migrant women from the Altiplano with a low level of education (some degree of primary school) and a few younger women born in El Alto (one of them with a high school degree).

Sartasipxañani was founded in 2006 when another group located in the same neighborhood (Sartañani) broke up. Sartañani had been created with the support of missionaries from Belen (Brazil) in 1995 and later grew within the neighborhood parish. Sartasipxañani was founded with the will to become independent from the church and from any other support organization.

After the split, members of Sartipxañani lent money to the group to buy new equipment, which were gradually reimbursed thanks to a high level of reinvestment (up to 60% of sales). Today, the organization owns its equipment and working capital for raw material, and rents a two-room locale at the home of one of the members. The production is organized collectively, with all women working together according to a fixed schedule. Work at Sartasipxañani is full-time and represent the women's main activity. Additionally, other people from the neighborhood, in particular young relatives, can work occasionally at the organization and receive payment according to the tasks performed.

All products are sold through ComArt (local shops in La Paz and exports), which has been the main marketing channel of Sartañani since 1997. At the time of the survey, the sales were regular and orders tended to exceed the capacity production. The organization was open to new members.

### *Typification indicators*

<b>Economic indicators</b>	<b>Characteristics</b>	<b>Var.</b>
<b>Importance of the principle of reciprocity in the production process</b>	<ul style="list-style-type: none"> <li>. Equipment, raw material and the workshop are common property of the organization and have been funded by the members' contributions and a high level of reinvestment (up to 60% of sales).</li> <li>. Production is organized collectively and technical knowledge is shared. When a new person joins the organization, a member will train her during two weeks.</li> </ul>	1
<b>Valorization of work</b>	<ul style="list-style-type: none"> <li>. All full-time workers are members and all members are full-time workers. Young relatives may work occasionally without being members.</li> <li>. Income is defined according to work (recorded by product or task performed for occasional workers).</li> </ul>	1
<b>Hybridization and coherence between economic, social, environmental and political objectives</b>	<p>The following decisions are mainly driven by the objective of increasing incomes:</p> <ul style="list-style-type: none"> <li>. supply (where to buy): according to prices (even when quality is low);</li> <li>. commercialization (level of price): according to production costs and competition;</li> <li>. type of production: first determined by training opportunity, later confirmed by market potential.</li> </ul> <p>The following decisions are mainly driven by criteria of inclusion, equity and providing a collective space for personal development:</p> <ul style="list-style-type: none"> <li>. distribution of work (equality among full-time members, equity for occasional workers: according to their needs, openness to those who most need work);</li> <li>. organization of production (collective);</li> <li>. funding (collective).</li> </ul>	0.5

Social indicators		
<b>Aim of social transformation, beyond income generation</b>	Personal development and building capacities are primary objectives of the group but there is no sign that this would translate into a vision of social transformation.	0
<b>Internal democratic solidarity—self-organization</b>	. Participation and collective decision-making are a principle of the group, to the point that the board mainly serves to perform operational tasks and virtually all decisions are made at the organization's level. . Sharing knowledge about management, production and commercialization is a principle, too.	1
<b>External democratic solidarity—autonomy</b>	Being independent is a highly valued objective and has determined the group's decision not to resort to any external support beyond ComArt. Low income and a high share of reinvestment have been the price to pay. Relation with ComArt is based on affiliation and is considered transparent and satisfactory with regard to the organization's own objectives.	1
Political indicators		
<b>Public dimension</b>	Although the organization aims to offer income-generating opportunities to women in the neighborhood, it has not become involved in public issues beyond the organization.	0
<b>Participation in intermediary public spaces for institutional entrepreneurship</b>	The organization does not participate in intermediary public spaces (membership at ComArt is described in terms of accessing markets and training and not linked to any political project; no mention in particular of ComArt's demand of a social insurance scheme for the artisans. Instead, Sartasipxañani intends to create an internal health fund).	0
<b>Importance of the common good and of democracy in the understanding of political participation</b>	No vision of political participation.	0

### IV.3. Mixed organizations with low level of economic consolidation

#### IV.3.1. Yatiñasa

##### *General information*

Yatiñasa is an informal association (it does not have legal personality nor internal regulations) of 25 families producing traditional Andean weavings. It is a mixed organization (women and men) composed by first- and second-generation indigenous migrants coming from the Altiplano, who now live most of the year in the city of El Alto, near La Paz. The organization was officially created in 1995 by a local intellectual leader involved in the indigenous movement for the commemoration of the 500-year anniversary of colonization and fighting for the recognition of indigenous culture.

During the three years that preceded the survey, sales were insufficient and the members had to lower their production (around 5 to 6 pieces/person/month, while they have a capacity of 20 pieces/person/month; in addition, 10 out of the 25 participating families were considered inactive) and resort to other income-generating activities. Sales are performed on the one hand through ComArt fair trade shops in Bolivia and ComArt's orders (international fair trade clients) and on the other hand by the members themselves, selling at local markets or through personal relations. While ComArt offers high prices, the time needed to sell the products is

generally long; on the contrary, local markets offer quick sales but low prices. It must further be noted that the organization severely criticizes ComArt for favoring other producers' organizations and creating unfair competition.

Despite several attempts, the organization has not received any financial support and is lacking a common workshop and working capital. As a consequence, work is entirely performed at home and every family owns its own equipment and raw material. Nevertheless, working at home is also considered a practical benefit for women in charge of young children.

### *Typification indicators*

<b>Economic indicators</b>	<b>Characteristics</b>	<b>Var.</b>
<b>Importance of the principle of reciprocity in the production process</b>	While Yatiñasa's discourse highlights the importance of reciprocity as the basis of the organization's philosophy, it is only partially implemented in the production process: <ul style="list-style-type: none"> <li>. production is performed at each family's home and there is no shared property beyond this level;</li> <li>. the organization's members share technical and ancestral knowledge and help each other perform their work.</li> </ul>	0.5
<b>Valorization of work</b>	<ul style="list-style-type: none"> <li>. All members are working in production and all workers are members of the organization.</li> <li>. Income is defined according to the sales of each worker or family (through ComArt or personal relations).</li> </ul>	1
<b>Hybridization and coherence between economic, social, environmental and political objectives</b>	<p>From the outset, the organization has had a dual objective: economic (to generate an income) and socio-political (to continue practicing weaving as an ancestral artistic form and to affirm the members' cultural identity).</p> <p>The following decisions are mainly driven by the socio-political objective:</p> <ul style="list-style-type: none"> <li>. choice of raw materials, models and techniques (production);</li> <li>. original choice to sell through ComArt as a fair trade organization aiming for the recognition of artisans' cultural identity (commercialization);</li> <li>. mutual help in case of necessity</li> </ul>	

<b>Political indicators</b>		
<b>Public dimension</b>	No mention of any participation in any public space	0
<b>Participation in intermediary public spaces for institutional entrepreneurship</b>	Yatiñasa is a member of ComArt, Red de OEPAIC and CIOEC, which it considers as political lobbying organizations. Its main demand regards the creation of an artisans' social insurance. Nevertheless, it does not participate in any of the activities of these organizations, nor does it have any direct contact with any authority.	0.5
<b>Importance of the common good and of democracy in the understanding of political participation</b>	The organization has a strong understanding of the common good and social justice dimension of its demand of an artisans' social insurance.	1

### IV.3.2. Wiphala

#### *General information*

Wiphala is an informal association (internal regulations were being redacted at the time of the survey; the organization did not have legal personality) producing Andean music instruments. It is made up of 20 families of the city of El Alto originating from the community of Walata Grande in the department of La Paz (first-generation Aymara migrants). The organization was created in 2003 by 12 women with the dual objective of increasing their sales and creating a space to share and learn together. Their husbands soon joined in, which was justified by the necessity of ensuring a specific part of the production process (tuning) traditionally performed by men.

At the time of the survey, every family owned its own equipment and had set up a small workshop at home. It was one of the organization's main objectives to acquire a common room and working capital; to this end, it was considering presenting co-funding projects with development NGOs. Indeed, since raw material (bamboo and wood) must be carried from the Valleys region, a common working capital would enable the producers to collectively organize their supply and save travel costs.

During the three years preceding the survey, sales had increased but remained insufficient; working for the organization was considered as a complement to other livelihood strategies, like agriculture in rural communities and urban informal trade and services. Sales were performed on the one hand through ComArt fair trade shops in Bolivia and ComArt's orders at the international level (one foundation in the United States placing orders over the two years preceding the survey) and on the other hand by the members themselves on local markets and through personal relations. Contrary to Yatiñasa, Wiphala was satisfied with ComArt and was looking for more producers of musical instruments to enter their association in order to gain influence and sales opportunities at ComArt.

*Typification indicators*

<b>Economic indicators</b>	<b>Characteristics</b>	<b>Var.</b>
<b>Importance of the principle of reciprocity in the production process</b>	<ul style="list-style-type: none"> <li>. Production is performed at each family's home and there is no shared property beyond this level (only a small share of sales is being saved for future common working capital; low material interdependence).</li> <li>. Common models have been defined in order to increase the sales' potential and enable collective provisioning of raw material (significant immaterial interdependence).</li> </ul>	0.5
<b>Valorization of work</b>	<ul style="list-style-type: none"> <li>. All the members are working as producers and all the organization's workers are members.</li> <li>. Prices are determined according to a fixed level of labor remuneration for all products.</li> </ul>	1
<b>Hybridization and coherence between economic, social, environmental and political objectives</b>	<p>The following decisions are mainly driven by a criterion of equity:</p> <ul style="list-style-type: none"> <li>. giving ComArt's orders to those who most need to work and helping each other in case of necessity (emergency fund);</li> <li>. setting a fixed level of labor remuneration.</li> </ul> <p>However, there were tensions in the determination of the level of labor remuneration, since some producers argued for lowering them in order to increase competitiveness.</p>	0.5
<b>Social indicators</b>		
<b>Aim of social transformation, beyond income generation</b>	The organization was first created by poor indigenous women with the aim of creating a space to share and learn together. This vision could have challenged local gender roles, but it has not been supported by an articulated project. Not surprisingly, the women indicate that this space has been diminishing after their husbands joined in.	0
<b>Internal democratic solidarity—self-organization</b>	<ul style="list-style-type: none"> <li>. Daily decisions regarding production and sales through ComArt are taken by the organization's board (composed of 5 people, elected for one year according to seniority). Extraordinary decisions (both social and economic) are taken by the members' Assembly.</li> <li>. Spreading knowledge and instituting internal checks on individual power has become an important principle of the organization after one member used direct contact to ComArt for personal profit. Today, strategic knowledge is shared.</li> </ul>	1
<b>External democratic solidarity—autonomy</b>	The organization's only external support is ComArt, whose governance is considered as being democratic. However, members insist that they are lacking external solidarity to get a common room and working capital and they hope to be able to get funding from an NGO once they have obtained legal personality.	0.5
<b>Political indicators</b>		
<b>Public dimension</b>	A public dimension of the organization has not been detected. The only contact to a public institution is to a local neighborhood association (j\$nta vecinal=, but solely for the purpose of gaining access to the j\$nta's room, without a vision of discussing any public matter.	0
<b>Participation in intermediary public spaces for institutional entrepreneurship</b>	As a member of ComArt and Red de OEPAIC, Wiphala hopes that these organizations will lobby for the creation of an artisans' social insurance, but without getting actively involved in the political process itself.	0.5
<b>Importance of the common good and of democracy in the understanding of political participation</b>	Even if they do not participate themselves in political action, Wiphala's members note that the demand for a social insurance will benefit all artisans beyond their own needs.	0.5

## IV.4. Mixed organizations with intermediate level of economic consolidation

### IV.4.1. Asociación Integral Villa San Antonio de Qutapiqiña (AIQ)

#### *General information*

AIQ is a not-for-profit association located in the a ll\$ (rural community) of Cololo (municipality of Pelechuco) in the north of the department of La Paz. It is dedicated to the transformation of local raw material (alpaca and vicuna fiber) into value-added products (thread and clothes respecting quality norms). At the time of the survey, it was composed of 70 indigenous families, 22 of which were actively producing for the organization (it has to be noted, though, that these figures may change rapidly according to sales opportunities).

AIQ was created in 1997 through a cooperation project founded by the Canadian NGO CECI. This project was oriented towards building local production capacity through technical training and organization. It was later considered as a "semi-failure" by AIQ's members since it did not sufficiently consider the marketing possibilities. When the project ended, production virtually stopped and it was only in 2006 that AIQ found new sales opportunities, mainly through a French commercial enterprise willing to cooperate with AIQ to help it define its product (standardized alpaca thread) and to buy this product at a fair price. In addition, AIQ became a member of RENACC La Paz in the hope of selling alpaca thread to weaving and knitting organizations in the network.

As far as the organization of production is concerned, every family owns its own herd of alpacas and shears the animals. Fiber is sold to AIQ, where it is sorted, spun and, in some cases, knitted or weaved collectively in the organization's common room. This room is the collective property of AIQ, but every family uses its own equipment for collective shearing and spinning in order to avoid conflicts and minimize risks. Women are traditionally involved in shepherding, shearing, spinning and knitting, while men are traditionally involved in weaving. Work at AIQ represents a complementary activity to livestock farming (during the period from March to October) and one of the main sources of income in the community.

#### *Typification indicators*

Economic indicators	Characteristics	Var.
<b>Importance of the principle of reciprocity in the production process</b>	<ul style="list-style-type: none"> <li>. Each family pays a contribution for the common room of the organization and for training, but all further equipment is individual.</li> <li>. Training is collective, but there is no mention of any explicit strategy of learning from one another.</li> </ul>	0.5
<b>Valorization of work</b>	<ul style="list-style-type: none"> <li>. Workers are members (membership at family level) and members are workers, although work can stop when sales are insufficient.</li> <li>. All members must invest the same amount of capital; income only depends on the amount of products sold to the organization (no capital income).</li> </ul>	1

<b>Hybridization and coherence between economic, social, environmental and political objectives</b>	Commercialization is mainly driven by economic criteria (ensuring sales and income): fair trade markets, in particular local fair trade markets, would be favored, but export through traditional channels is also considered. The following decisions/practices take into account social objectives (creating economic opportunities for the whole community and neighboring communities) and ecological objectives (protecting the environment, in particular the alpaca/vicuna species): . production process respectful of animals and environment; . open membership; . willingness to fund social and environmental projects based on AIQ's sales.	0.5
<b>Social indicators</b>		
<b>Aim of social transformation, beyond income generation</b>	AIQ's aim is formulated in terms of transforming the locally available raw material in order to gain aggregate value, which is currently captured by foreign (Peruvian) entrepreneurs. This aim is transformative of the social and economic order when considered in terms of class relations.	1
<b>Internal democratic solidarity—self-organization</b>	. Important decisions are submitted to the general Assembly and/or to AIQ's board, composed of 5 people elected for 4 years according to seniority, active participation in the organization, availability of time and gender. . At the same time, administration has been delegated to a full-time administrator (a member of the community and of the organization) who holds a great part of the organization's strategic knowledge.	0.5
<b>External democratic solidarity—autonomy</b>	The organization has learned from previous experience with Canadian NGO CECI and now actively chooses its external partners according to its own objectives: 1) projects with aid organizations and commercial partners in order to increase sales (and not only production); 2) affiliation to umbrella organizations in the field of fair trade and solidarity economy (RENACC La Paz and CIOEC) in order to learn from this model and to increase sales opportunities.	1
<b>Political indicators</b>		
<b>Public dimension</b>	The organization clearly expresses the public dimension of its action at the level of the community (a Il\$ Cololo) and the municipality (Pelechuco), although it does not regularly participate into public spaces.	0.5
<b>Participation in intermediary public spaces for institutional entrepreneurship</b>	The organization is a member of RENACC La Paz and CIOEC because they defend a model of solidarity economy and fair trade, but it does not directly take part in institutional entrepreneurship.	0.5
<b>Importance of the common good and respect of democracy in political participation</b>	Discourse on political participation is oriented by the understanding of participation in building common good at the local level; no specific elements regarding the respect of democratic principles; no aspects of private or corporative vision.	1



#### *IV.4.2. Corrigiendo Huellas*

##### *General information*

Corrigiendo Huellas is an informal group of around 20 persons from different neighborhoods of the city of El Alto producing knitwear. Most members are women with young children (18 out of 20 by the time of the survey), yet the organization was founded by a group of men and is still led by one of them. This leader first worked in a garment factory and then founded a small enterprise producing machine-knitted clothing. In 2002, after a work accident, he created Corrigiendo Huellas with several male companions as a collective organization producing machine-knitted clothing. He was encouraged to do so by the manager of the association ASARBOLSEM (Asociación artesanal boliviana "Señor de Maíz"), a well-known second-level solidarity economy organization established in El Alto in 1989. It further received funding from the Spanish aid institution ICSOD (

Social indicators		
<b>Aim of social transformation, beyond income generation</b>	The objective of helping each other is considered from a reparative point of view, without a transformative vision.	0
<b>Internal democratic solidarity—self-organization</b>	. The organization is managed by a board (4 people, 2-year terms), whose current president is the founder of the group. It is not clear whether other people will be willing and able to assume this responsibility in the future. Discussions with all members also take place at the organization's meeting every two weeks, but it is not clear whether they have an impact on decision-making. . The organization's leader ensures contact to ASARBOLSEM (getting orders and raw material, bringing products and attending monthly meetings). Transmitting knowledge to other members is mentioned as an objective, yet it is only incipient and knowledge remains fairly concentrated.	0.5
<b>External democratic solidarity—autonomy</b>	The group receives or has received support mainly from ASARBOLSEM (commercialization) and from ICSOD (funding and technical support). In both cases, the relation is judged satisfactory since the group has been able to follow its own objectives.	1
Political indicators		
<b>Public dimension</b>	The organization participated in the "Enterprising Meeting of Solidarity Economy and Fair Trade in Latin America" (Encuentro Empresarial de Economía Solidaria y Comercio Justo en América Latina) organized by RENACC in 2005 and is still affiliated to RENACC La Paz despite ASARBOLSEM's exit from this organization in 2006. This provides for occasional participation in the public space.	0.5
<b>Participation in intermediary public spaces for institutional entrepreneurship</b>	The organization's membership in RENACC La Paz is driven by the search for economic opportunities (not by institutional entrepreneurship). It further contacted the local government of El Alto to demand training and equipment, but received no answer.	0.5
<b>Importance of the common good and of democracy in the understanding of political participation</b>	The organization's contact to RENACC La Paz and to the local government is guided by the understanding of its own role as an organization aiming to create employment opportunities with a social vision. There is a mix of common good and self-interest in this understanding.	0.5

## IV.5. Summary

Graph 1 illustrates how the nine indicators help differentiate profiles of organizations in relation to the ideal-typical model of solidarity enterprise (example of Yatiñasa).

As already noted in part III, it must be recorded that we did not assume homogeneity within each of the four categories presented here, given the small number of cases considered and the existence of several other variables for which we did not control. Our overall goal was methodological: to operationalize the typification indicators based on the analysis of a number of cases. Here we simply illustrate how these indicators, once consolidated, allow us to establish one organization's profile.



It appeared to us that specific indicators were needed to capture the specificity of the Bolivian organizations, born in a context of high informality and labor precariousness. Based on these observations, this paper develops the following methodological proposal: starting from a small number of dense, qualitative case studies on Bolivian solidarity economy organizations, it elaborates an operationalization of nine economic, social and political indicators of solidarity enterprises—initially proposed by Hillenkamp and Laville (2013)—into a series of categorical variables. These variables are summarized in Table 5 (Part III), which represents the central result of this paper. The case studies presented in Part IV illustrate how this table was built and how the variables can be applied to particular cases but it is not a result in itself at this stage.

It should be noted that our assumption is not that this operationalization is universal, nor that the ideal type of solidarity enterprise replaces the social enterprise ideal type. We believe instead that the ideal type of solidarity enterprise complements the social enterprise ideal type and that the context studied through the cases of Bolivian organizations reflects specificities that we characterize as being a context of high informality and labor precariousness. It is only in this field that a generalization may be possible and should be tested. For Bolivia, we also expect, at a later stage, that the types defined a priori on the basis of the composition by sex and degree of economic consolidation (see Part III) would be refined into homogeneous sub-categories, or that some of them would be replaced by cross-categories.

There will be lessons to learn from the first results of the research teams that looked at solidarity enterprises in contexts of high informality and labor precariousness in other countries, with a view to assessing the possibilities of consolidating common indicators and variables to define a typology of solidarity enterprises. The ICSEM project recognizes the importance of institutionalization processes for social enterprises; the collective paper initiated by Hillenkamp and Laville additionally focuses on the political dimension of solidarity enterprises and proposes three political indicators observable at the organizational level. We have also outlined here the relevance of the interactions, degrees of cooperation and collective action among solidarity economy organizations and with other actors. The question remains, however, to determine how to collect relevant information at the meso- and macro-sociological level on these dimensions in a systematic manner and on a comparable basis between countries or regional contexts and how to articulate this information with the typology at the level of the organizations.

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