

Case study

NODESS: Strategic alliances in promoting the Social and Solidarity Economy as a strategy to solve problems and challenges generated by the COVID-19 pandemic

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Abstract: In Mexico, through the National Institute of Social Economy (INAES in Spanish), innovative strategies have been promoted that seek the creation of propitious ecosystems for the development of associative projects that provide solutions to community needs. In this sense, in 2019, the Nodos de Impulso a la Economía Social y Solidaria (NODESS) were created, which are territorial alliances between academia, local government and Organizations of the Social Sector of the Economy, which unite capacities and intentions to promote the Social and Solidarity Economy (SSE) in their territories. At the time of the COVID-19 pandemic, the NODESS have had to adapt their processes and rethink their role to be actors that contribute to the solution of the great social problems in short-term times. This article presents the experience of three NODESS and the actions they carried out to promote SSE as a strategy for problems and challenges generated by COVID-19.





NODESS: Strategic alliances in promoting the Social and Solidarity Economy as a strategy to solve problems and challenges generated by the COVID-19 pandemic.

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ABSTRACT

In Mexico, through the National Institute of Social Economy (INAES in Spanish), innovative strategies have been promoted that seek the creation of propitious ecosystems for the development of associative projects that provide solutions to community needs. In this sense, in 2019, the *Nodos de Impulso a la Economía Social y Solidaria* (NODESS) were created, which are territorial alliances between academia, local government and Organizations of the Social Sector of the Economy, which unite capacities and intentions to promote the Social and Solidarity Economy (SSE) in their territories. At the time of the COVID-19 pandemic, the NODESS have had to adapt their processes and rethink their role to be actors that contribute to the solution of the great social problems in short-term times. This article presents the experience of three NODESS and the actions they carried out to promote SSE as a strategy for problems and challenges generated by COVID-19.

CONTEXTUALIZATION

The prevailing capitalist model is increasingly attributed negative consequences at a social, economic, environmental and cultural level, affecting a large part of the world population with deplorable wages and working conditions, economic and socio-cultural inequalities, and environmental scenarios that threaten the man's life on account of extractivism, absence of community and cultural identity, among others (Bouchard, 2012; Chaves & Monzón, 2018; Coraggio, 2011; Hudson, 2009; Nicolăescu, 2012; Sahakian & Dunand, 2015). In the context of the current pandemic, this model has been questioned and has become evident, for which different proposals have taken center stage with the aim of providing solutions to the problems.

Among the proposals are the Social and Solidarity Economy (SSE) model and its different expressions according to the specific contexts where they emerge. Although the SSE has an





ancient tradition in practice from primitive communities (Cueto et al., 2018), the first forms of organization of this model with characteristics similar to those known today began in the framework of the industrial and French revolutions, with a strong component of associativism in the 19th century (Moulaert & Ailenei, 2005).

Also in Mexico, SSE practice has advanced to its conceptualization and institutionalization. They were different indigenous and rural communities that in the post-revolutionary period (20 and 30 decades of the 20th century) collectively organized to fight against the dispossession of large landowners (Bonfil, 2016) and the cooperative and worker movement has also strongly marked the SSE in the country.

The Social Sector of the Economy was institutionally recognized for the first time in Mexico in the constitutional reform of 1983. Later in 2012 the Law of Social and Solidarity Economy (LESS in spanish) was enacted, providing the general framework that defines and characterizes the sector, and created different instruments to promote it, including INAES.

INAES is an administrative body with technical, operational and management autonomy, which has the objective of “implementing, as part of the National Social Development Policy, public policies for the promotion and development of the social sector of the economy, in order to strengthen and consolidate the Sector as one of the pillars of economic and social development in the country, through participation, training, research, dissemination and support for productive projects in the Sector ”(Chamber of Deputies of the H. Congress of the Union, 2012).

In Mexico it is estimated that there are approximately 61,000 Organizations of the Social Sector of the Economy (OSSE in spanish), which is equivalent to 12 million of members (Instituto Nacional de la Economía Social, 2013), and it is estimated that these contribute to the national GDP in a 1.22% (INAES, 2019). According to different diagnoses carried out, these organizations and in general the Social Sector of the Economy in Mexico, face internal problems such as organizational, productive, commercial, administrative aspects; as well as external problems associated with the context in which they develop, such as the absence of SSE culture, shortcomings in the legislation that protects them, ignorance of their nature, among others (Fernández et al., 2012; Gómez-Carreto et al. , 2018; Murillo, 2018; Secretariat of Social Development, 2017)

In order to address these problems and in accordance with its objective, since 2018 INAES began to design high-impact strategies mainly oriented towards the development of different types of capacities (productive, organizational, commercial, etc.) and territorial





and inter-institutional actors linkage that promote a strong ecosystem for the consolidation of the SSE and the OSSE.

One of these strategies is called *Nodos de Impulso a la Economía Social y Solidaria* (NODESS), which are territorial alliances made up of academic institutions, local governments and OSSE, which together design and develop SSE exercises based on local needs in where they are located and focused on principles and values necessary for the economy to serve people, thus contributing to the National System of Training and Specialized Technical Assistance (SINCA in spanish) (INAES, 2021).

The creation of alliances with these three actors aims to take advantage of the capacities and knowledge of each sector in a synergistic work that contributes to the solution of territorial problems with different initiatives of the SSE. In order to become NODESS, the alliances present to INAES a work proposal to be carried out for six months, a period in which they are accompanied by the Institute with training processes and monitored in accordance with their work plan. At the end of this period, with evaluation criteria based on compliance, impact and innovation, some alliances are formed as NODESS.

With the NODESSs formed, it also seeks to create and consolidate a National Network of articulation, cooperation and collective construction of knowledge that favors territorial work and at the same time helps the consolidation of the SSE in the country. Therefore, from the INAES and in collaboration with the NODESS, dissemination actions, capacity building, linkage and operational management are promoted, to formalize and consolidate said Network.

After two invitations made since 2019 by INAES to conform NODESS, today there are 41 NODESS (representatives of 167 institutions) that are part of the National Network, which is in organizational and integrating processes to work on a common agenda. Between the first and second calls, there was a conjunctural moment in the strategy due to the pandemic caused by COVID-19, which led to the adaptation of the processes in a virtual way and the search for alternatives by the NODESS to work in the territory.

Despite the difficulties, different NODESS managed to be resilient and implement actions with OSSE and local communities, who with greater intensity required attention and support in the face of the social and economic crisis derived from the pandemic. This situation has also mobilized both the alliances and the INAES with the strategy in general, to generate processes that truly help the SSE to be lived in the territories as an alternative to the problems and challenges of COVID-19.





METHODOLOGY

Within the *Nodos de Impulso a la Economía Social y Solidaria* - NODESS strategy, the objective of this article is to analyze the role played by the NODESS in promoting the SSE as a strategy for problems and challenges generated by COVID- 19. For this purpose, the research was developed through the multiple case study methodology (Stake, 1999) in which three NODESS that are part of the National Network were established as case studies.

The selection of the cases (NODESS) was made taking into account the will to participate, the ease of access to information and the maximization of learning (Stake, 1999). The three cases have been NODESS, of which their work and effort in the pandemic era have been known and, although the three have similar characteristics in terms of their integration, they are located in different regions, which allows observing contrasts according to the contextual characteristics. Furthermore, each case is led by an actor from a different sector: academic institution, local government and OSSE.

RESULTS

Next, the results of the case studies are presented in relation to the role played by NODESS in promoting SSE as a strategy for problems and challenges generated by COVID-19.

- Case 1: NODESS Promoters of the Social Economy in Yucatan (*Promotores de la Economía Social de Yucatán en español*) and producer groups in southern Yucatan.

The NODESS *Promotores de la Economía Social de Yucatán* is made up of the Universidad Tecnológica del Poniente, the Cooperativa Hupalal Kin SC de SRL, the Secretariat of Social Development of the State and Granada Tello Consultores S.C.P. The work carried out is framed in the municipalities of the Poniente and the South of the State of Yucatan and in the Municipalities of Hopelchén, Campeche. Among the main characteristics of the population of these municipalities are the indigenous language (Maya) and limited access to the internet (only in public parks).

In the last 18 months, among the projects attended by NODESS, agricultural, artisanal and commercial activities stand out in accordance with the vocations of communities in the south of the State. Similarly, the priority attention to women and activities carried out in groups is highlighted, making OSSE development processes in the food and beverage sector





from agroecological production, implementing a solidarity distribution and marketing network to create channels distribution of their products.

The pandemic caused by COVID-19, generated several effects in the communities served by NODESS, like difficulties in marketing due to the less commercial activity with cities because of the lack of face-to-face channels such as fairs or points sales that depended on tourism and the closure of markets. All of which has made the communities sell their production at low prices; loss of jobs; food shortages due to the closure of communities and mobility restrictions; price increases for self-consumption items and raw materials; difficulty activating new production projects and incorporating women due to the need for their children to attend to their studies at home.

Given the impossibility of travel by the members of NODESS to the municipalities of attention, the work team contacted the communities to devise strategies that would help to continue the education and training program, and attend to emerging needs for the pandemic. With the intention of not breaking the dynamics of the previous months, at first NODESS trained groups and communities in technical aspects of connectivity and tools such as Zoom and WhatsApp. Additionally, it provided equipment and modems to the communities to be able to carry out training and support sessions. On the other hand, in order to respond to the unemployment situation of the heads of the families and the lack of income, the process of creating the products with added value designed for their periodic commercialization in the city of Merida was accelerated, a strategy that allowed encourage producers and generate biweekly income.

Derived from the actions that were carried out as of May 2020, the following main results were generated: 21 organized groups from the food and beverage sector, 81 participants from 61 families from 7 communities in southern Yucatán, a network of solidarity marketing with a base of 370 clients and 90 biweekly orders, which generates a direct monthly economic spill of \$ 40,000.00 to producers without intermediaries, more than 40 products for sale (30 of them with added value, brand and corporate identity) , 9 groups implementing agroecological techniques and the Mayan milpa, creation of 14 saving groups and selection of leaders for the formation of a Cooperative called *Tierra Nativa*.

These results have been significant for all those involved from various aspects. The first of these is the economic one: in the communities and in the groups served, because this allowed them to generate income for families in times of pandemic crisis. It also had a positive impact on the mood of the groups and on the strengthening of self-esteem and empowerment by ensuring that they could achieve production and marketing results with





their effort. Additionally, in the NODESS these actions contributed to the cohesion of the participants and working towards the same objective, which in the same time generated new expectations to broaden the horizons of the project. Nowadays, there is the promise of sale of the products to the French company Mexsafr, starting in October 2021.

Based on these results, GT Consultores, as responsible for the methodology in NODESS, generated important rethinking and carried out a process of "concurrent entrepreneurship in social economy", in which it is planned and executed simultaneously, generating immediate results, and an exercise of trial and error that allows to consolidate the ideas executed, this being one of the main lessons learned.

Another learning from NODESS was to verify the capacities of the participants in the face of adverse situations and the richness of being part of the empowerment and human growth of the communities, particularly in the case of women, who before the project indicated that "they are only housewives", and currently they have become microentrepreneurs, learning aspects of production, marketing, finance, agroecology and commercialization.

With all of the above and under the pandemic and post-pandemic scenario, NODESS rethinks methodologies and seeks to continue promoting projects that allow replicating the experience in the region. One of the challenges faced is to achieve balance and focus in the work of each of the project's producers because they also have intra-family difficulties as a consequence of the pandemic. There is also the challenge of consolidating the *Tierra Nativa* cooperative as a solidarity distribution and marketing circuit through training processes and technical assistance in connection with other sectors of civil society, in order to expand it to other regions, to the national and international level.

- Case 2: Networks of textile cooperatives in Mexico City in the face of COVID-19. Experiences from the NODESS Life and Knowledge

The *NODESS Vida y Saberes* based in UPIICSA was established in 2019, with the aim of promoting entrepreneurship and the professionalization of Cooperatives and OSSE that address problems from a social innovation approach and will contribute to local and regional development. In addition to this, NODESS promotes articulation between the various actors that make up the SSE ecosystem in Mexico City. It is made up of 16 institutions: 7 academic, 3 governmental and 6 OSSE, among which is the Union of Cooperatives of the Social and Solidarity Economy (Unión de Cooperativas de la Economía Social y Solidaria, UCESS, in Spanish), with whom it collaborated to develop this case study. The geographical scope of *Vida y Saberes* is mainly Mexico City, but although it has an





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impact on states such as Guerrero, Puebla, Oaxaca, Chiapas and the State of Mexico, where it develops research projects with strategic allies. The main activities carried out at this NODESS are: workshops, courses, consultancies, participatory action research projects, public policy proposals, as well as the dissemination and awareness of the SSE, through seminars, forums and academic events.

Before the period of health crisis derived from COVID-19, it gave various courses in person, which were adjusted to the new normal dictated by this situation, so it began to work virtually, adjusting times, agendas and activities. In addition, NODESS generated projects to promote cooperative entrepreneurship among UPIICSA students and supported the development of solidarity consumption models to support the marketing of cooperative products.

In the context of the pandemic, there have been multiple difficulties that different sectors of Mexican society have suffered. In Mexico City, specifically the OSSEs, have not been considered within the programs and strategies for economic recovery. Therefore, these organizations, and particularly cooperatives, find themselves disadvantaged amid the pandemic. For this reason, in Mexico City, food cooperatives developed advance purchase strategies and the creation of consumer groups that would allow them to continue developing benefits for members; in the case of education cooperatives, they went to implement new methodologies to carry out their activities. These strategies have allowed these organizations to survive in the pandemic period.

An example to highlight in the COVID-19 period is the UCESS, which was developed in the Iztapalapa mayor's office, where small companies from the demarcation were called to supply face masks and sanitary gowns that would serve the population of that region. This statement was attended by some small cooperatives in the textile industry that are part of UCESS and participated in the NODESS training workshops. However, these organizations did not individually have the requirements requested by the mayor's office or by themselves they were unable to meet the specified demand. Faced with this situation, a strategy was developed among more than 20 UCESS cooperatives to collectively satisfy the demand and be selected to produce this medical equipment.

The role of NODESS was to develop the necessary courses and consultancies so that the cooperatives that participated in the collective contract strategy had their papers in order and were up to date with their payments from the Tax Administration System (SAT in spanish). This support, together with the training workshops that were provided to the cooperatives, allowed the successful development of the proposed strategy, benefiting





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more than 20 families that had been left without sources of income during the COVID-19 period.

The “*Unión*” strategy was to incorporate different cooperatives into the project so that they could jointly meet the needs demanded, this was possible due to cooperative principles and values, as well as the *Unión* integration strength. In this sense, principles and values such as education, training and information, responsibility, solidarity, cooperation between cooperatives and mutual aid played a determining role in the development and success of the strategy.

The example of UCESS shows how those cooperatives that work with a solid base of principles and values have the capacity to be resilient in the face of problems such as the one we are experiencing in the face of COVID-19, especially if the strategies developed have the intervention of other actors in the ecosystem, such as academia, NODESS and unions. *Vida y Saberes* managed to develop new workshops that promote intercooperation, mutual aid and solidarity as the basis for new business models and strategies implemented by cooperatives for their success and survival.

Continuing with this pandemic increases differences in society, those organizations that do not have technological tools, communication networks such as the internet, among others, are condemned to have little training, so the role of NODESS will be to seek strategies to continue training and advising OSSEs.

- Case 3: NODESS *Yanemuk* and Mayan communities of Quintana Roo

The NODESS Yanemuk “*Esfuerzo y trabajo*” is made up of the Secretariat of Social Development, the Intercultural Maya University, the Yaxché Farmers' Society and the Caribbean Agrocorporative. Its field of action includes the Central and South zone of the State of Quintana Roo in the municipalities of Othon P. Blanco (OPB), Bacalar, Felipe Carrillo Puerto (FCP) and José María Morelos. Since its creation, NODESS has focused on the creation and execution of the following projects: Development program for permaculture providers; Nicolás Bravo water purifier for young entrepreneurs in OPB; The Melchos Ocampo bumblebees for the production, packaging and marketing of honey; and Tumben Kuxtal, a cyber and antenna in Yalchén FCP.

COVID-19 amplified the limited access to health and communication in Mayan communities and the measures taken to minimize the impact showed a great ignorance of the ancestral health systems. In addition, due to the emergency, there was an increase in the workload





that affected indigenous women to a greater extent and the restrictions affected (informal) trade, directly damaging family sustenance. On the other hand, education was seriously affected since many communities do not have internet access.

In addition, the closure of hotels, restaurants and parks in the Riviera Maya caused the dismissal of hundreds of workers who returned to their places of origin as a result of intraregional migration for labor and economic reasons.

NODESS programs and actions within indigenous communities attempted to promote responsible governance norms; knowledge recovery; own education and prevention processes on the impact of COVID-19. In food security, actions such as gardens and family farming were promoted. In addition, collaboration with governments to respond to the emergency was encouraged, as well as alliances with different sectors.

Among the different actions developed by NODESS, the technical assistance and undertakings of OSSE were the ones that predominated the most from the identification of the OSSEs in the territory, since they lacked direction, action plans and systematized processes that did not allow to achieve the social objectives for which they were established. The plan was based on four fundamental principles to generate SSE systems: 1) Organization; 2) Training; 3) Development; 4) Accompaniment.

The participatory reflection-action methodology allowed incorporating the dialogue of knowledge or “tsikbal” in an intercultural environment, where nobody gets to teach, but everyone contributes elements for the planning of a project with the sum of experiences and knowledge, as is customary in the Mayan communities. This method makes it possible to rescue the customs, traditions and worldview of the inhabitants of indigenous communities and sets aside tax processes that tend to fail projects.

In the processes implemented by NODESS, the government actor was fundamental to align the programs and actions with the needs identified in the localities in a constant society-State dialogue. For its part, the academy was also relevant for its link with the communities of the Mayan area and the sensitive participation to propose new forms of consumption, distribution, production and storage of goods and services, based on the SSE. Finally, the OSSEs and the communities were the ones who gave life to the projects with their participation in the different actions and also with their knowledge they allowed the collective construction of knowledge

Among the main results of the NODESS work, the incubation of projects for the productive chain in agriculture, agro-industry and forestry stands out; the elaboration of business and





social diagnoses that allowed orienting the interested parties to develop ventures; the undertaking of 4 OSSE in the municipalities and; the delivery of trainings, forums and workshops on SSE.

Faced with these processes and in the context of the pandemic, NODESS faces challenges such as: continuing to work with the difficulty of the limited resources of the different actors; the greater integration of participatory and action research methodologies in the projects that are implemented with the communities; the depth of the knowledge of the needs of the territory's OSSE for their better accompaniment; and finally, the close articulation with other NODESS for collaborative learning and capacity building.

CONTRIBUTIONS AND RECOMMENDATIONS FROM THE NODESS STRATEGY

By integrating with the participation of three key actors of the SSE ecosystem in Mexico (local government, academia and OSSE), NODESS have great potential to positively impact the territories and contribute to addressing problems with solutions based on social innovation and collaboration. As observed in the cases, according to the realities of the context, the proximity of these actors in the NODESS allows them to listen to the true needs of the OSSEs and the communities, create and articulate government programs and take advantage of the scientific capacities of the academy. with community knowledge to detonate new knowledge and processes.

The creation of these alliances with institutional support from the federal government has contributed, in some cases, to the fact that different actors from the same territory come together and work collaboratively, and in other cases, to formalize and widely disseminate the work they have already been doing with territorial actors, thus triggering new links and opportunities to strengthen individual and collective capacities. Likewise, the impulse of this initiative from INAES has allowed other federal and international bodies such as the Ministry of Public Education, the Ministry of Environment and Natural Resources, the National Council for Science and Technology, the German Cooperation for Sustainable Development (GIZ), ECLAC, OECD, among other governmental and international organizations, link with the NODESS through collaborative and financing projects.

Since only two years have passed since the creation of the NODESS, their contributions in the territories and in the SSE at the national level have been relevant, mainly in terms of making the SSE visible as a model for the construction of social and economic welfare; the development and strengthening of capacities in communities; the incubation of associative





projects; the potentiation of the productive vocation of the territories; and the articulation of actors.

Within the framework of the NODESS National Network, it is sought that the various strategies and actions that are being carried out in the territory and that are achieving positive results, can be systematized and shared among the members of the Network, seeking to potentiate good practices, methodologies, policies and territorial works, it will help it to be self-managed and have a structure that allows it to function based on democracy and collaboration. In all this, INAES seeks to facilitate the processes and have the necessary platforms to achieve this, including the institutionalization of the program.

The Network seeks to generate a democratic and collaborative structure that works together with dependencies of different levels of government and international organizations to achieve a territorial understanding and develop practices and actions that seek to reactivate the economy during and after the COVID-19 crisis.

For the reasons mentioned and taking the three case studies as a reference, it is clear that the paths to economic reactivation must go through understanding that the economy belongs to the people and their territories and must be used as a means to an ultimate end: the wellness. From there, institutional alliances at the territorial level pay special attention to closeness and direct listening to people, as well as to propose and co-create actions that return to self-management and with it an economic, social and environmental recovery for people.

With a view to replicate NODESS in other countries, several elements are important to take into account, however, three of these are highlighted: the development of the program with the characteristics of a public policy, considering since its creation the participation of the different stakeholders and that they are going to get involved; inter-institutional linkage to strengthen the program and align objectives and resources; the institutionalization of the initiative as its consolidation is achieved, to avoid that it is a program of a government in command and can survive over time.

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